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COMMERCE AND INDUSTRY

LAND-USE: CONDITIONS AND TRENDS

REPORT CONTAINING BACKGROUND INFORMATION FOR THE COMMERCE AND INDUSTRY ELEMENT OF THE COMPREHENSIVE PLAN OF SAN FRANCISCO • PREPARED BY THE SAN FRANCISCO DEPARTMENT OF CITY PLANNING

8201542

LAND USE:
CONDITIONS AND TRENDS

Report containing background information for the Commerce and Industry Element of the Comprehensive Plan of San Francisco.

Prepared by the San Francisco Department of City Planning in conjunction with the Office of the Mayor, Economic Analysis Unit.

October, 1975

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INTRODUCTION

This report is one of a series by the Department of City Planning to provide background information for preparation of the Commerce and Industry Element of the City's Comprehensive Plan. Other reports in the series concern Industrial Trends, Labor Force Trends, Commercial Trends and Neighborhood Commercial Districts.

The purpose of this report is to supply data, relative to commercial and industrial land use, which can be used at a later date to establish planning policy for certain sections of the city. The information deals with both the location and amount of land used by the commercial and industrial sectors of the city's economy. It covers the eastern one-third of San Francisco, the section containing most of the larger and more concentrated commercial and industrial land uses as shown on the four maps that follow. Information on commercial land use in the downtown and outside of this study area is being published in the Neighborhood Commercial Districts report.

LAND USED FOR COMMERCE

SOURCE: 1970 LAND USE SURVEY

PREPARED BY THE SAN FRANCISCO DEPARTMENT OF CITY PLANNING

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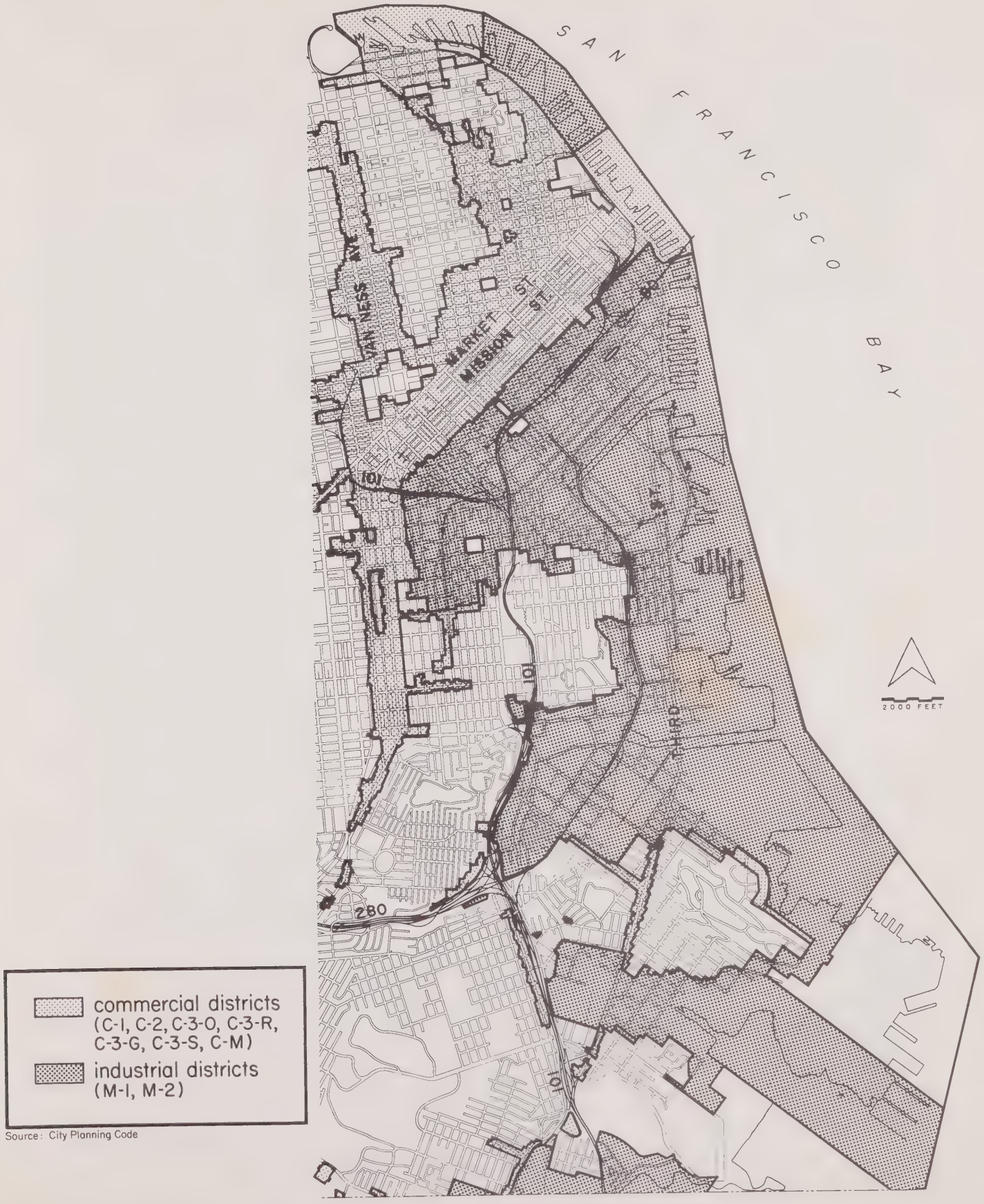
LAND USED FOR INDUSTRY

SOURCE 1970 LAND USE SURVEY

PREPARED BY THE SAN FRANCISCO DEPARTMENT OF CITY PLANNING

Major Commercial and Industrial Area

Map I



Source: City Planning Code

COMMERCIAL AND INDUSTRIAL ZONING DISTRICTS

Major Commercial and Industrial Area

Map 2

land used for commerce

land used for industry

Source: 1970 Land Use Survey, Department of City Planning

GENERALIZED LAND USE

I. LOCATIONS OF LAND USES

The 1970 Land Use Survey conducted by the Department of City Planning was an inventory of all land-use activity in San Francisco. Every parcel of land was inventoried as to lot size, the primary ground-floor land use occupying the parcel, and secondary land uses. Uses were classified according to the Standard Industrial Classification (SIC) Manual of the United States Bureau of the Budget. This classification system was expanded and modified in certain ways for purposes of the survey. The following list contains the major group classifications of commercial and industrial land uses as discussed in this report:

Agriculture, Forestry and Fisheries:

Major Group 01. Agricultural production
Major Group 07. Agricultural services and hunting and trapping
Major Group 08. Forestry
Major Group 09. Fisheries

Mining:

Major Group 10. Metal mining
Major Group 11. Anthracite mining
Major Group 12. Bituminous coal and lignite mining
Major Group 13. Crude petroleum and natural gas
Major Group 14. Mining and quarrying of nonmetallic minerals, except fuels

Contract Construction:

Major Group 15. Building construction-general contractors
Major Group 16. Construction other than building construction-general contractors
Major Group 17. Construction-special trade contractors

Manufacturing:

Major Group 19. Ordnance and accessories
Major Group 20. Food and kindred products
Major Group 21. Tobacco manufactures
Major Group 22. Textile mill products
Major Group 23. Apparel and other finished products made from fabrics and similar materials
Major Group 24. Lumber and wood products, except furniture

Manufacturing (cont.)

Major Group 25. Furniture and fixtures
Major Group 26. Paper and allied products
Major Group 27. Printing, publishing, and allied industries
Major Group 28. Chemicals and allied products
Major Group 29. Petroleum refining and related industries
Major Group 30. Rubber and miscellaneous plastics products
Major Group 31. Leather and leather products
Major Group 32. Stone, clay, glass, and concrete products
Major Group 33. Primary metal industries
Major Group 34. Fabricated metal products, except ordnance, machinery, and transportation equipment
Major Group 35. Machinery, except electrical
Major Group 36. Electrical machinery, equipment, and supplies
Major Group 37. Transportation equipment
Major Group 38. Professional, scientific, and controlling instruments; photographic and optical goods; watches and clocks
Major Group 39. Miscellaneous manufacturing industries

Transportation, communication, electric, gas, and sanitary services:

Major Group 40. Railroad transportation
Major Group 41. Local and suburban transit and interurban passenger transportation
Major Group 42. Motor freight transportation and warehousing
Major Group 44. Water transportation
Major Group 45. Transportation by air
Major Group 46. Pipe line transportation
Major Group 47. Transportation services
Major Group 48. Communication
Major Group 49. Electric, gas, and sanitary services

Wholesale trade:

Major Group 50. Wholesale trade

Retail trade:

Major Group 52. Building materials, hardware, and farm equipment dealers
Major Group 53. Retail trade--general merchandise
Major Group 54. Food stores
Major Group 55. Automotive dealers and gasoline service stations
Major Group 56. Apparel and accessory stores
Major Group 57. Furniture, home furnishings, and equipment stores
Major Group 58. Eating and drinking places
Major Group 59. Miscellaneous retail stores

Finance, insurance, and real estate:

Major Group 60. Banking
Major Group 61. Credit agencies other than banks
Major Group 62. Security and commodity brokers, dealers, exchanges, and services
Major Group 63. Insurance carriers
Major Group 64. Insurance agents, brokers, and service
Major Group 65. Real estate
Major Group 66. Combinations of real estate, insurance, loans, law offices
Major Group 67. Holding and other investment companies

Services:

Major Group 70. Hotels, rooming houses, camps, and other lodging places
Major Group 72. Personal services
Major Group 73. Miscellaneous business services
Major Group 75. Automobile repair, automobile services, and garages
Major Group 76. Miscellaneous repair services
Major Group 78. Motion pictures
Major Group 79. Amusement and recreation services, except motion pictures
Major Group 80. Medical and other health services
Major Group 81. Legal services
Major Group 82. Educational services
Major Group 84. Museums, art galleries, botanical and zoological gardens
Major Group 86. Nonprofit membership organizations
Major Group 88. Private households
Major Group 89. Miscellaneous services

Government:

Major Group 91. Federal Government
Major Group 92. State government
Major Group 93. Local government
Major Group 94. International government

Tables 1 and 2 contain information about the amounts of these uses and the intensity of development for all land uses in the study area. Maps 3 through 12 illustrate the relative location of each group of land uses.

Table 1: 1970 Number of Commercial and Industrial Land Uses in Study Area (Census Tracts 101-125, 176-180, 226-234, 251, 606-610)

STANDARD INDUSTRIAL CLASSIFICATION BY MAJOR GROUPS	ACTIVITY	General	Central or Administrative Office	Sales Office	Research and Development	Warehouse or Storage	General - Open Air Use	Warehouse or Storage - Open Air Use	Automobile Parking Open Air Use
SIC 1 - 9 AGRICULTURE FORESTRY & FISHERIES	Number of Uses in Study Area	26	6	6	-	0	-	-	1
	Percent of Citywide in Study Area	15.4%	100%	100%	-	0.0%	-	-	25%
SIC 10 - 14 MINING	Number of Uses in Study Area	1	8	7	-	-	-	-	-
	Percent of Citywide in Study Area	25%	100%	100%	-	-	-	-	-
SIC 15 - 17 CONTRACT CONSTRUCTION	Number of Uses in Study Area	326	45	47	1	29	65	2	-
	Percent of Citywide in Study Area	59.2%	50%	55.3%	100%	70.4%	91.6%	100%	-
SIC 19 - 39 MANUFACTURING	Number of Uses in Study Area	1,726	76	491	4	68	98	-	4
	Percent of Citywide in Study Area	88.0%	88.4%	91.4%	100%	93.1%	93.3%	-	50.0%
SIC 40 - 49 TRANSPORTATION, COMMUNICATION & PUBLIC UTIL.	Number of Uses in Study Area	1,064	56	174	2	17	127	0	7
	Percent of Citywide in Study Area	87.9%	83.6%	97.2%	100%	85.0%	94.1%	0.0%	70.0%

Table 1 (Continued)

STANDARD INDUSTRIAL CLASSIFICATION BY MAJOR GROUPS	ACTIVITY	General	Central or Administrative Office	Sales Office	Research and Development	Warehouse or Storage	General - Open Air Use	Warehouse or Storage - Open Air Use	Automobile Parking Open Air Use
SIC 50 WHOLESALE TRADE	Number of Uses in Study Area	1,290	467	785	-	59	169	1	7
	Percent of Citywide in Study Area	88.4%	98.3%	93.6%	-	85.5%	97.1%	100%	43.7%
SIC 52 - 59 RETAIL TRADE	Number of Uses in Study Area	3,995	25	20	-	42	13	3	35
	Percent of Citywide in Study Area	47.2%	73.5%	66.7%	-	53.7%	39.4%	75.0%	18.5%
SIC 60 - 67 FINANCE, INSURANCE & REAL ESTATE	Number of Uses in Study Area	1,816	28	81	2	6	0	-	5
	Percent of Citywide in Study Area	66.1%	96.6%	84.4%	66.7%	100%	0.0%	-	13.5%
SIC 70 - 89 SERVICES	Number of Uses in Study Area	25,487	38	75	0	11	53	1	19
	Percent of Citywide in Study Area	17.3%	64.4%	85.2%	0.0%	73.3%	38.1%	50.0%	24.1%
SIC 91 - 93 FEDERAL, STATE & LOCAL GOVERNMENT	Number of Uses in Study Area	913	1	5	0	3	32	-	2
	Percent of Citywide in Study Area	41.5%	33.3%	100%	0.0%	100%	45.1%	-	33.3%

Source: 1970 Land Use Survey, San Francisco Department of City Planning

Note: A "use" is one activity of an establishment taking place on a given lot; number of uses cannot be equated with number of establishments.

Table 2: Amount of Land in Study Area Containing Uses in Structures, Containing Open-air Uses, or Vacant*

Census Tract	Land Containing Uses in Structures (Acres)	Land Containing Open Air Uses** (Acres)	Open Vacant Land (Acres)
101	66.10	17.03	1.18
102	101.56	0	4.21
103	40.20	0.27	1.22
104	50.61	1.05	3.18
105	24.97	6.70	4.34
106	27.52	1.03	0.45
107	27.14	1.04	0.13
108	35.38	0.13	1.77
109	39.22	0.11	0.24
110	36.77	1.46	0.15
111	37.39	2.00	0
112	27.73	0.36	1.31
113	16.16	0.40	0.24
114	13.84	0.11	0
115	21.07	1.41	1.79
116	26.53	8.77	0
117	80.93	0.75	3.73
118	8.99	0.33	0
119	25.26	0	0.14
120	18.46	0.73	0
121	19.87	0.62	0.08
122	26.58	1.93	0.07
123	28.01	2.13	0.28
124	63.76	5.61	0.05
125	24.95	6.40	0
176	162.47	29.49	1.03
177	118.26	23.32	1.45
178	104.24	13.59	2.69
179	137.30	35.77	2.80
180	134.86	36.43	3.77
226	175.83	38.48	3.20
227	223.84	26.48	27.60
228	195.85	9.53	6.11
229	117.27	4.02	2.67
230	198.25	9.60	12.00
231	261.34	3.32	70.39

Table 2: Amount of Land in Study Area Containing Uses in Structures, Containing Open-air Uses, or Vacant* (cont.)

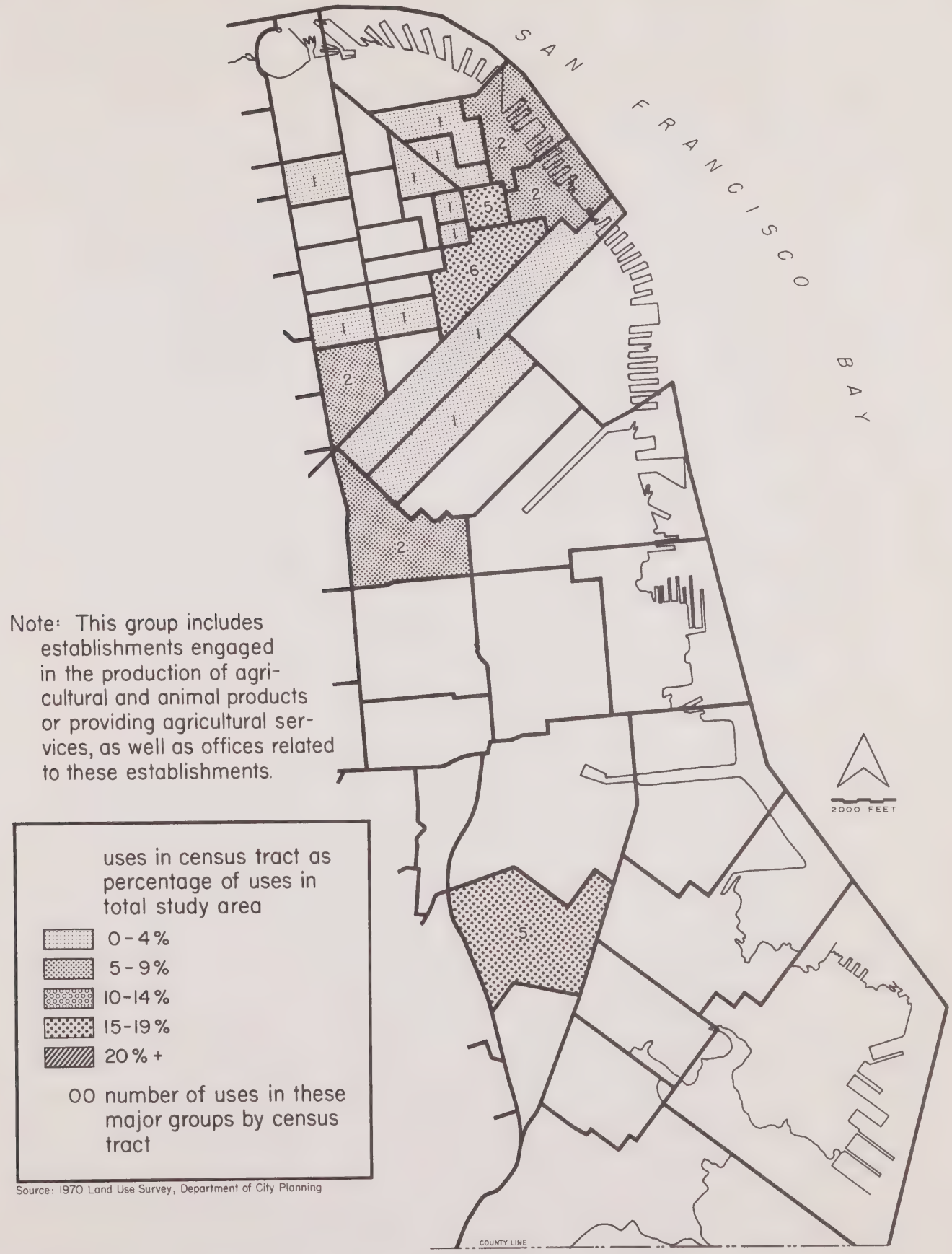
Census Tract	Land Containing Uses in Structures (Acres)	Land Containing Open Air Uses** (Acres)	Open Vacant Land (Acres)
232	91.37	13.93	28.56
233	65.76	48.92	7.62
234	110.29	16.15	20.71
251	95.15	0	14.75
606	522.03	0	0
607	126.74	192.04	1.12
608	132.63	74.65	112.62
609	254.15	114.84	12.14
610	140.03	91.51	199.59
Total	4,256.66	878.03	555.38

Source: 1970 Land Use Survey, San Francisco Department of City Planning

* Includes all land uses: Residential, Commercial, Industrial, Utility, Institutional, Private Recreation and Public.

**Open Air Uses include: Used Car or Parking Lot, Other Open Air Commerce, Open Air Industry, and Railroad Tracks or Terminal

Study Area : Major Commercial and Industrial Census Tracts Map 3



Note: This group includes establishments engaged in the production of agricultural and animal products or providing agricultural services, as well as offices related to these establishments.

uses in census tract as percentage of uses in total study area

- 0-4%
- 5-9%
- 10-14%
- 15-19%
- 20%+

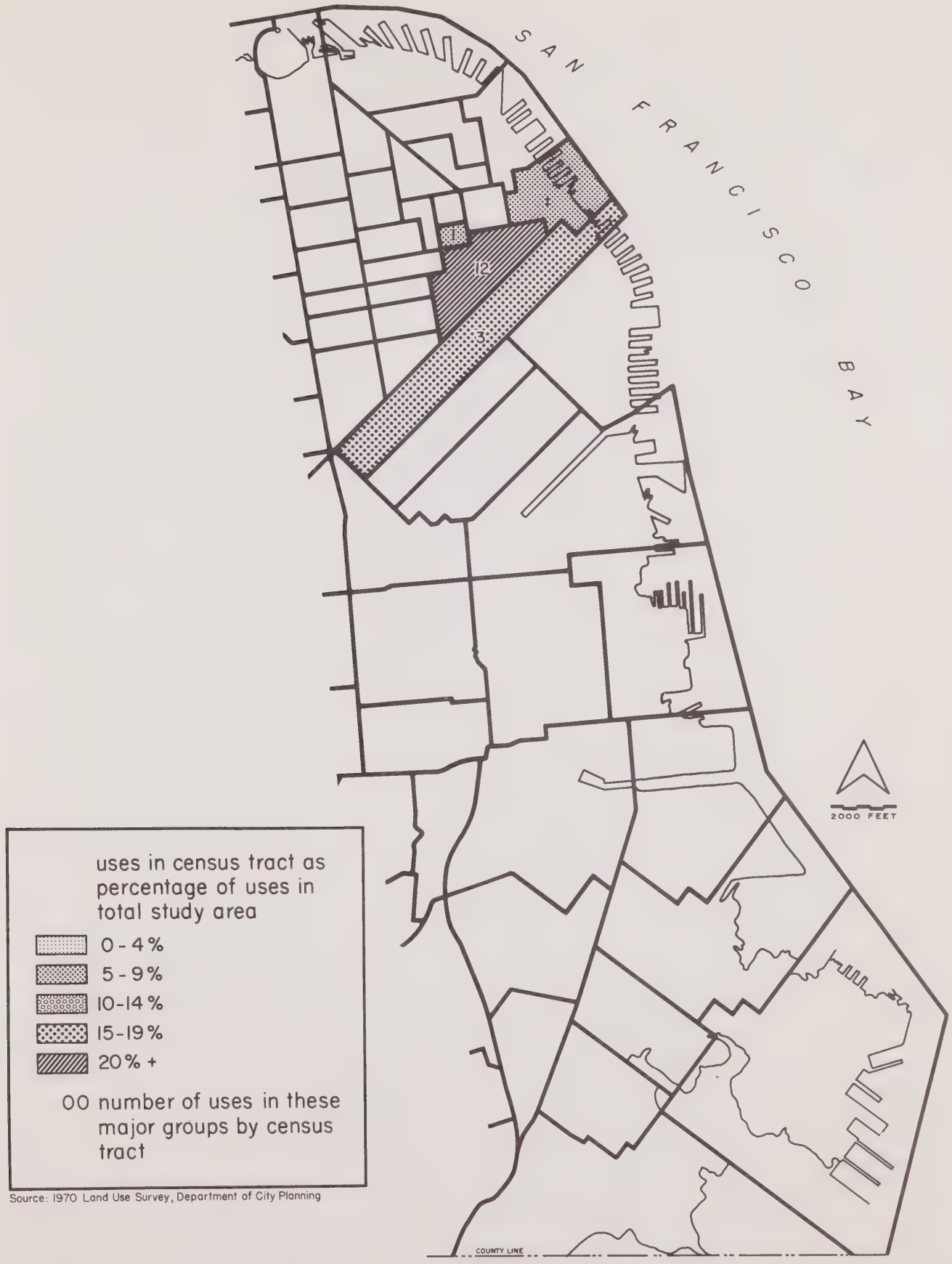
00 number of uses in these major groups by census tract

Source: 1970 Land Use Survey, Department of City Planning

AGRICULTURE, FORESTRY AND FISHERIES

STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 01-09

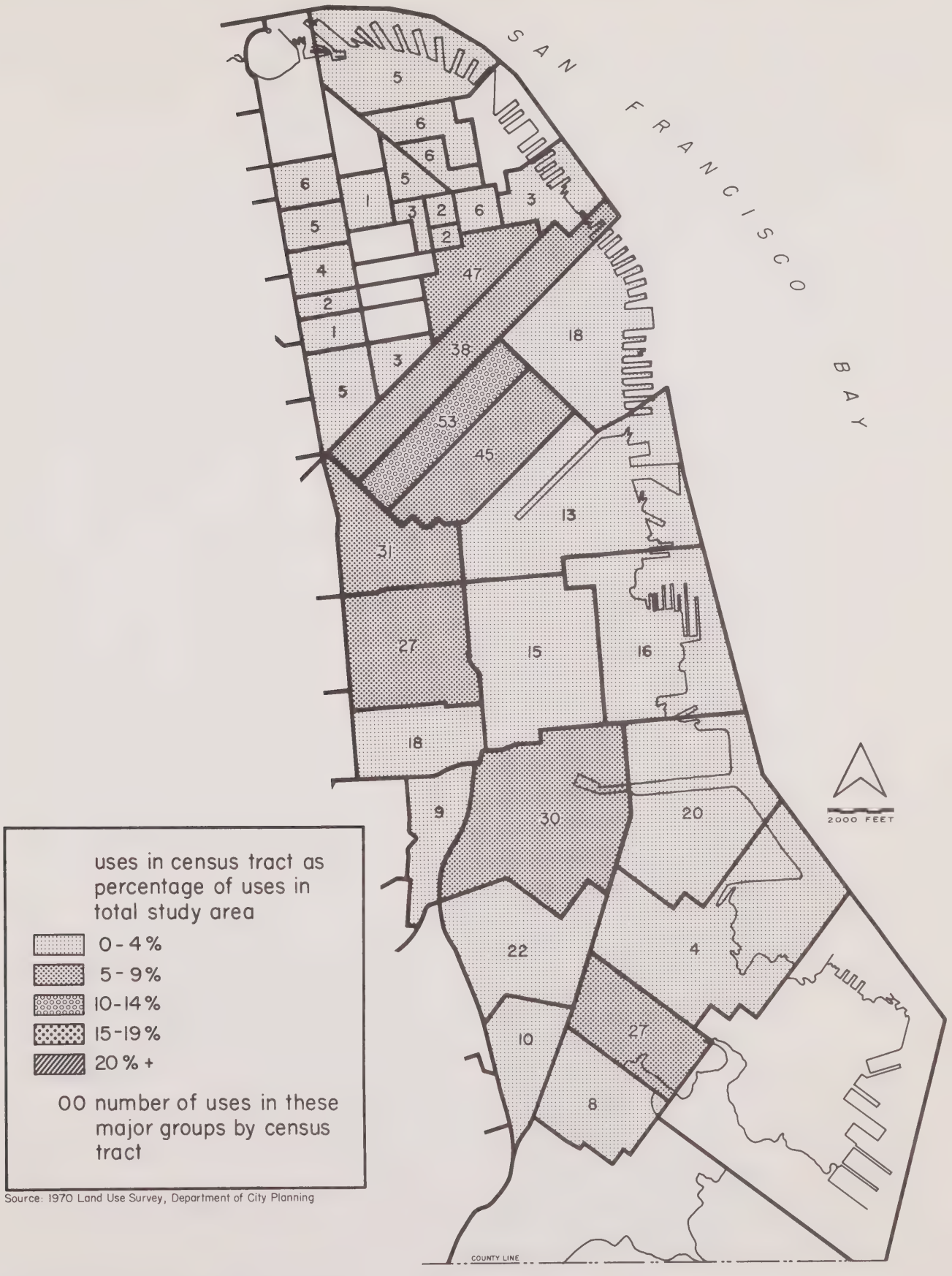
Study Area: Major Commercial and Industrial Census Tracts Map 4



Source: 1970 Land Use Survey, Department of City Planning

MINING
STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 10-14

Study Area : Major Commercial and Industrial Census Tracts Map 5

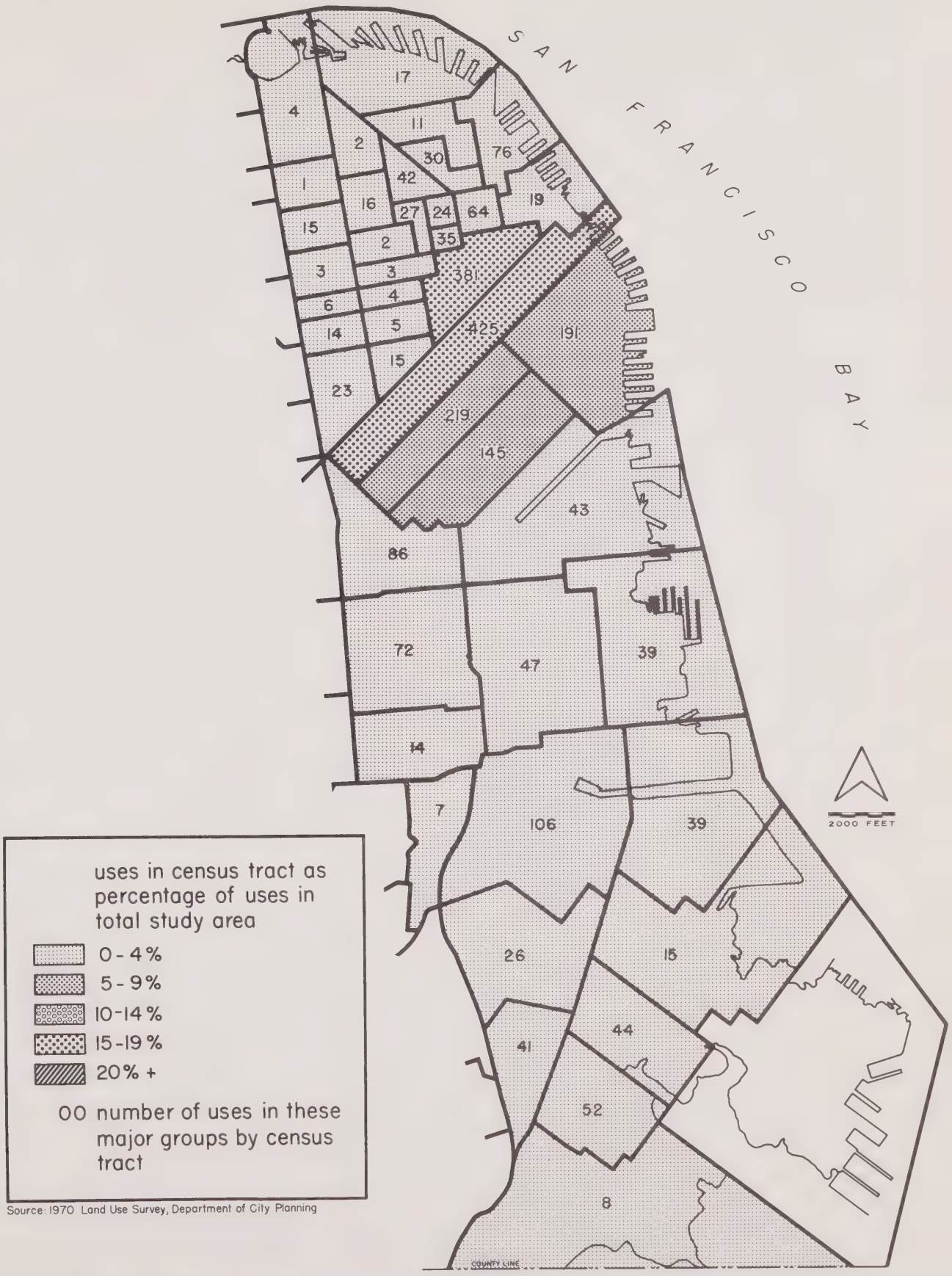


Source: 1970 Land Use Survey, Department of City Planning

CONTRACT CONSTRUCTION

STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 15-17

Study Area : Major Commercial and Industrial Census Tracts Map 6

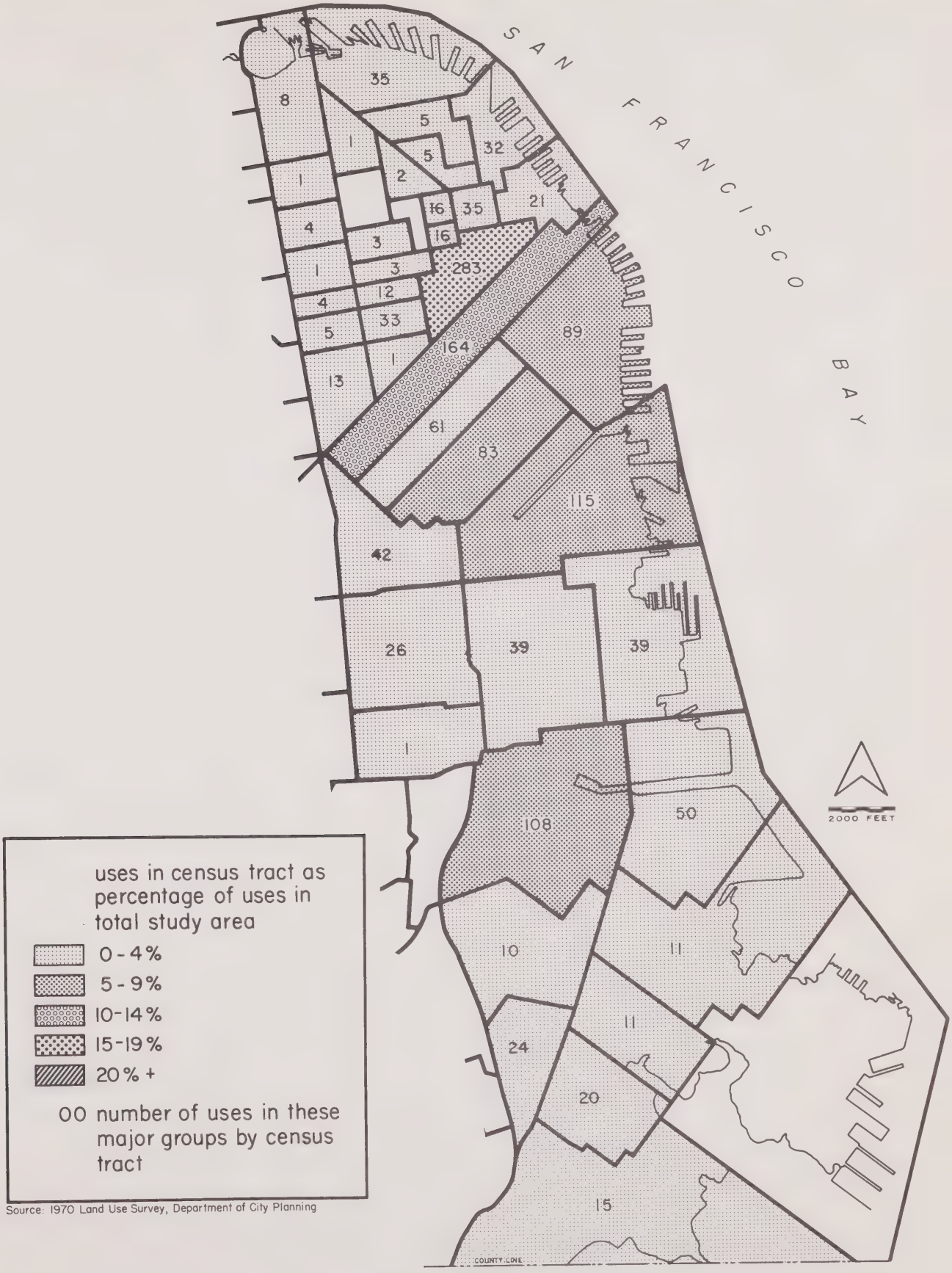


Source: 1970 Land Use Survey, Department of City Planning

MANUFACTURING

STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 19-39

Study Area: Major Commercial and Industrial Census Tracts Map 7

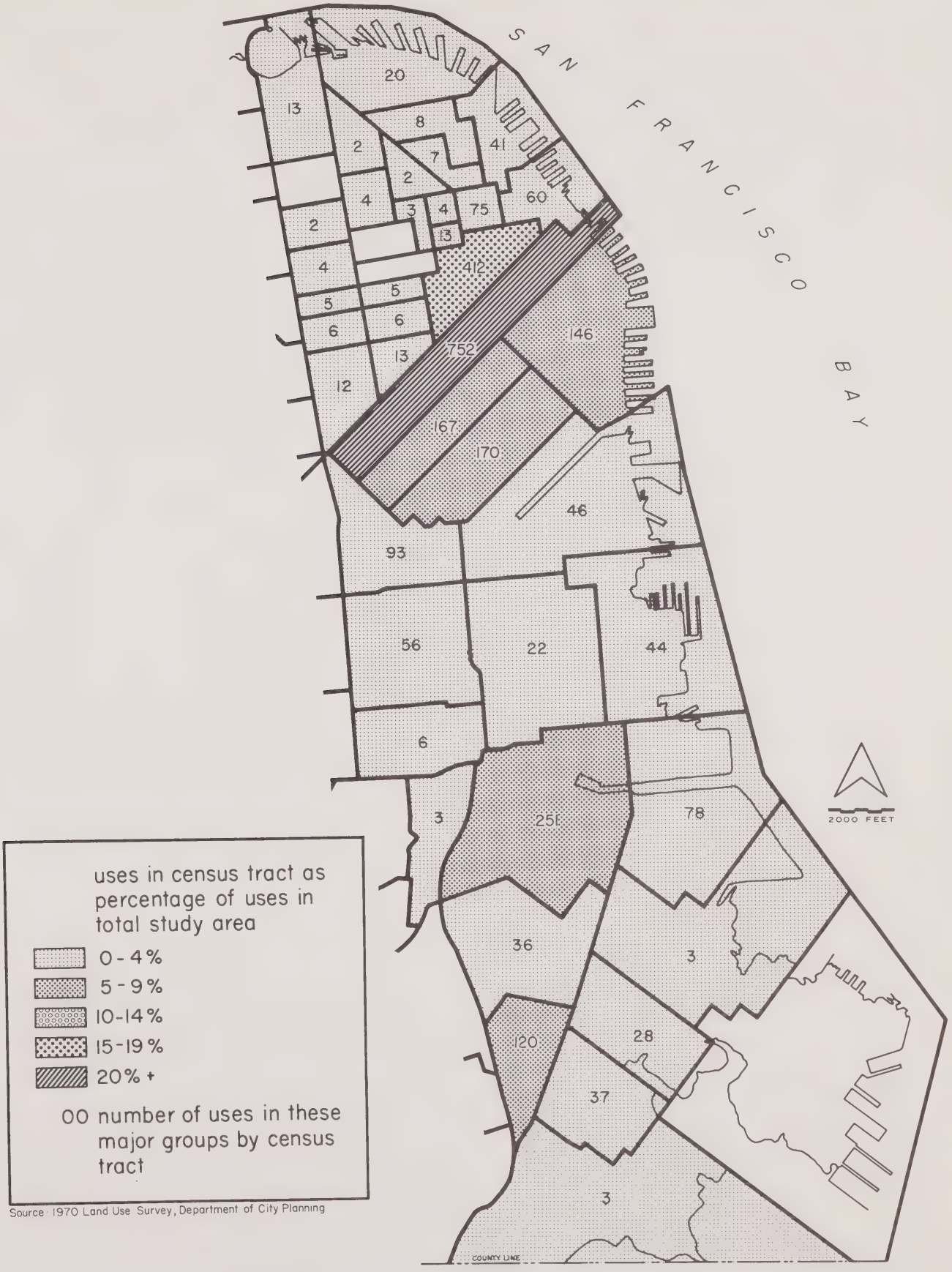


Source: 1970 Land Use Survey, Department of City Planning

TRANSPORTATION, COMMUNICATION, ELECTRIC, GAS AND SANITARY SERVICES

STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 40-49

Study Area : Major Commercial and Industrial Census Tracts Map 8

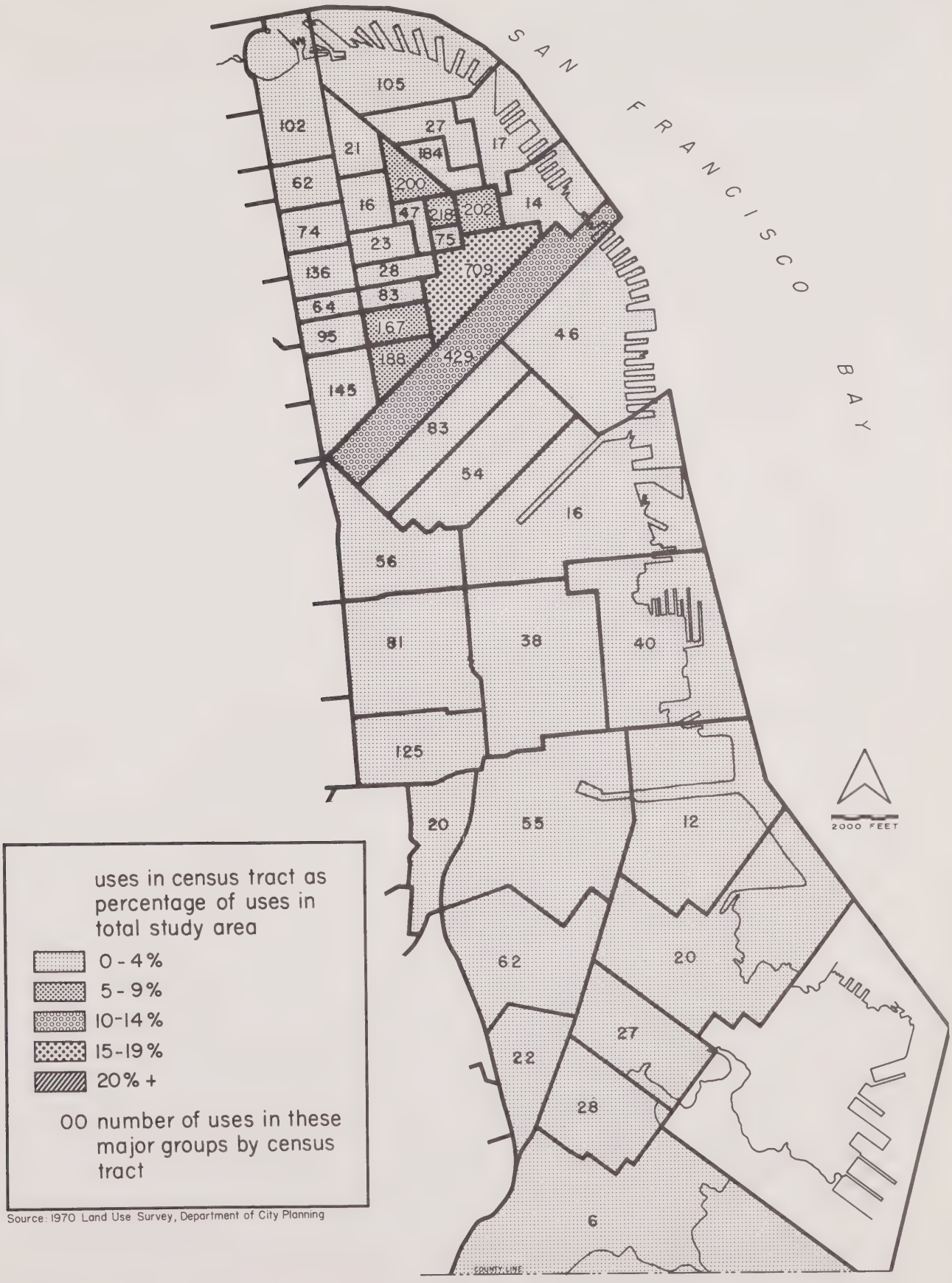


Source: 1970 Land Use Survey, Department of City Planning

WHOLESALE TRADE

STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUP 50

Study Area: Major Commercial and Industrial Census Tracts Map 9

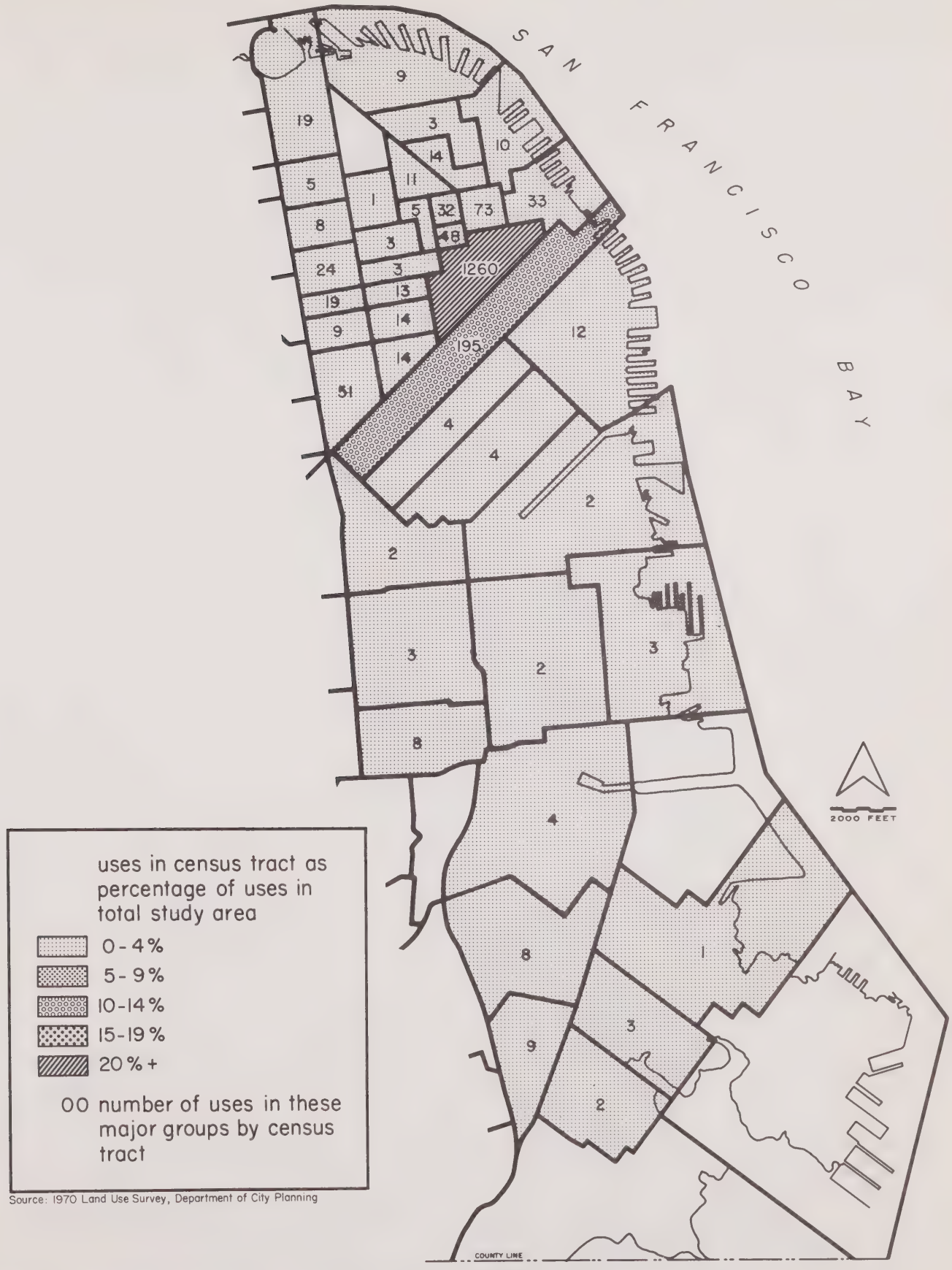


Source: 1970 Land Use Survey, Department of City Planning

RETAIL TRADE

STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 52-59

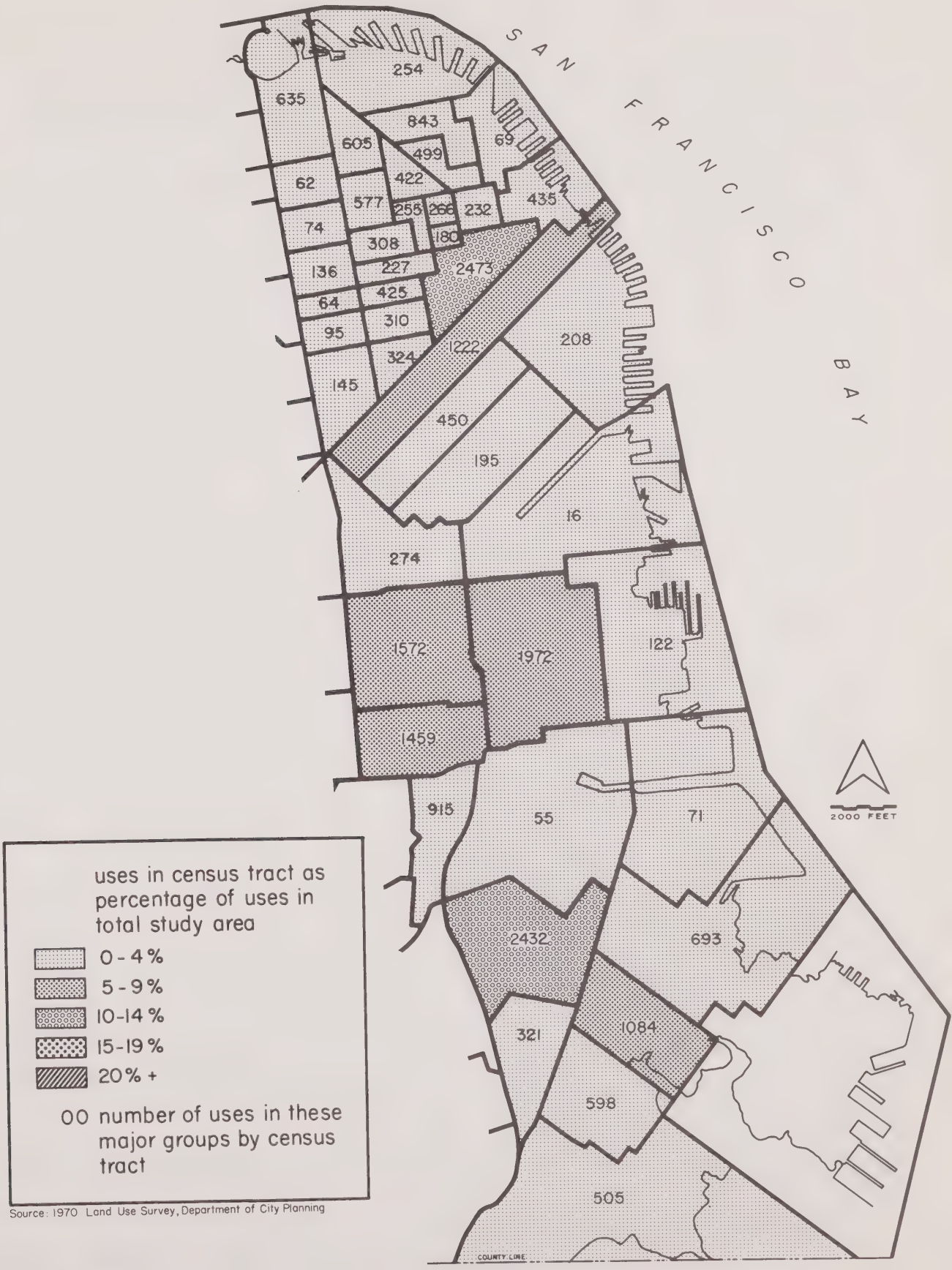
Study Area : Major Commercial and Industrial Census Tracts Map 10



Source: 1970 Land Use Survey, Department of City Planning

FINANCE, INSURANCE AND REAL ESTATE
STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 60-67

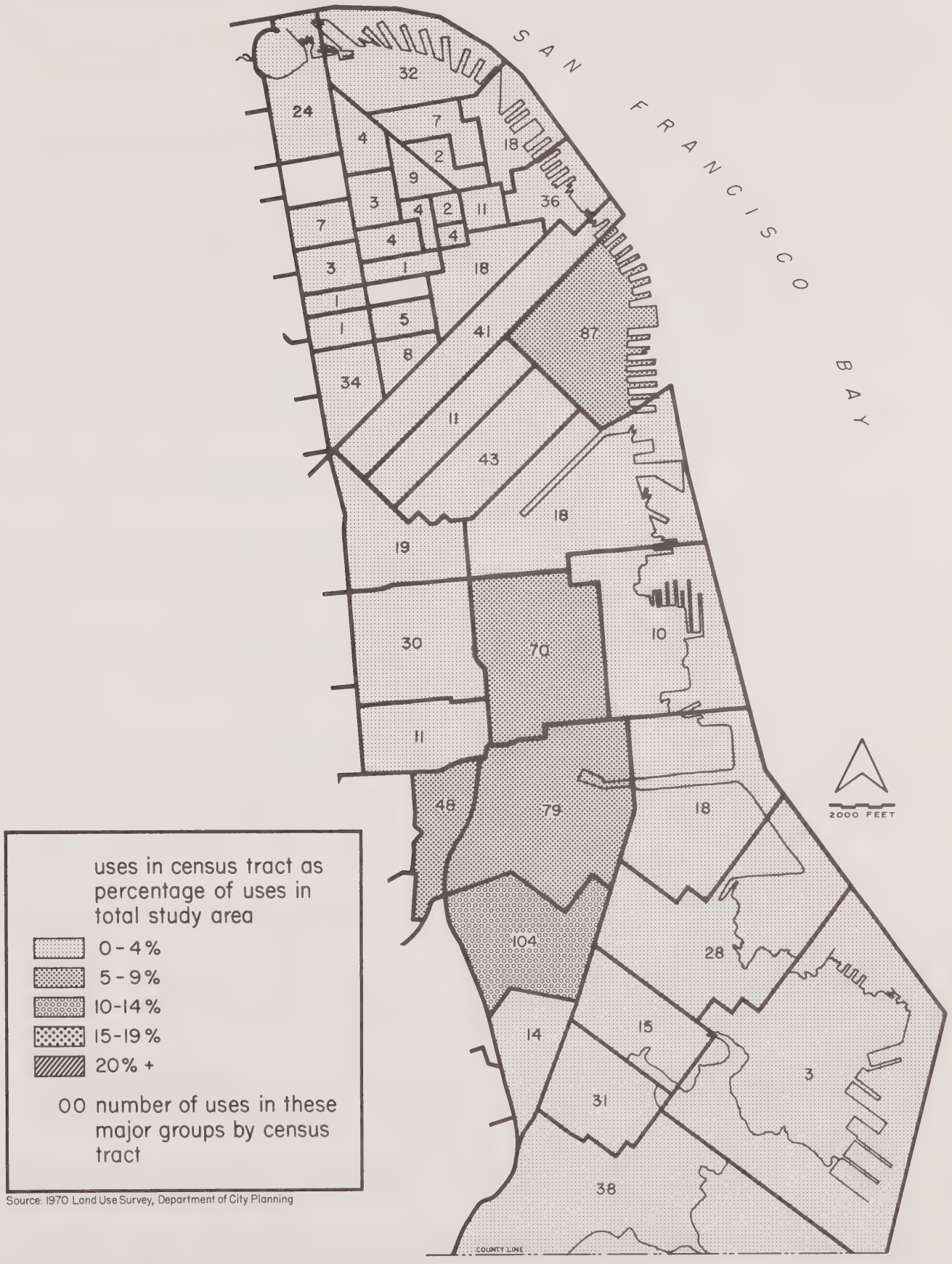
Study Area: Major Commercial and Industrial Census Tracts Map II



SERVICES

STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 70-89

Study Area : Major Commercial and Industrial Census Tracts Map 12



Source: 1970 Land Use Survey, Department of City Planning

FEDERAL, STATE AND LOCAL GOVERNMENT

STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 91-93

II. LAND-USE CONDITIONS

The great majority of land used for industry in San Francisco is located in the section of the city south of Market Street and east of Mission Street. Due to current trends in the industrial sector of the economy (see "Industrial Trends" background report), the possibility is great that important land-use changes will occur in this industrial area. For that reason a project was undertaken to record the existing condition of both the commercial and industrial physical plants of this section of the city. In addition, a review was made of building condition information from the 1964 Community Renewal Program for the purposes of reference.

1975 CONDITION OBSERVATION

The Field Observation Project consisted of direct observation by staff members of the street corridors throughout each of the Planning Areas in the project area, and in the commercial and industrial portions of certain adjacent Planning Areas. A "street corridor" was defined as a single segment of street between two intersections plus the structures and land facing that street on either side. For each street corridor observed, the following information was recorded:

Location of Environmental Amenities - those factors of the environment which tend to affect the quality of the community positively. These include areas of landscaping and improved open space, structures obviously in good condition and consistently well maintained, recently rehabilitated older structures, and new development projects.

Location of Environmental Detriments - those factors which have a negative effect on the quality of the community. Among the items noted in this classification were structures in bad condition or vacant, vacant usable land, areas of conflict between adjacent land uses, and problems on the street caused by the parking and loading functions.

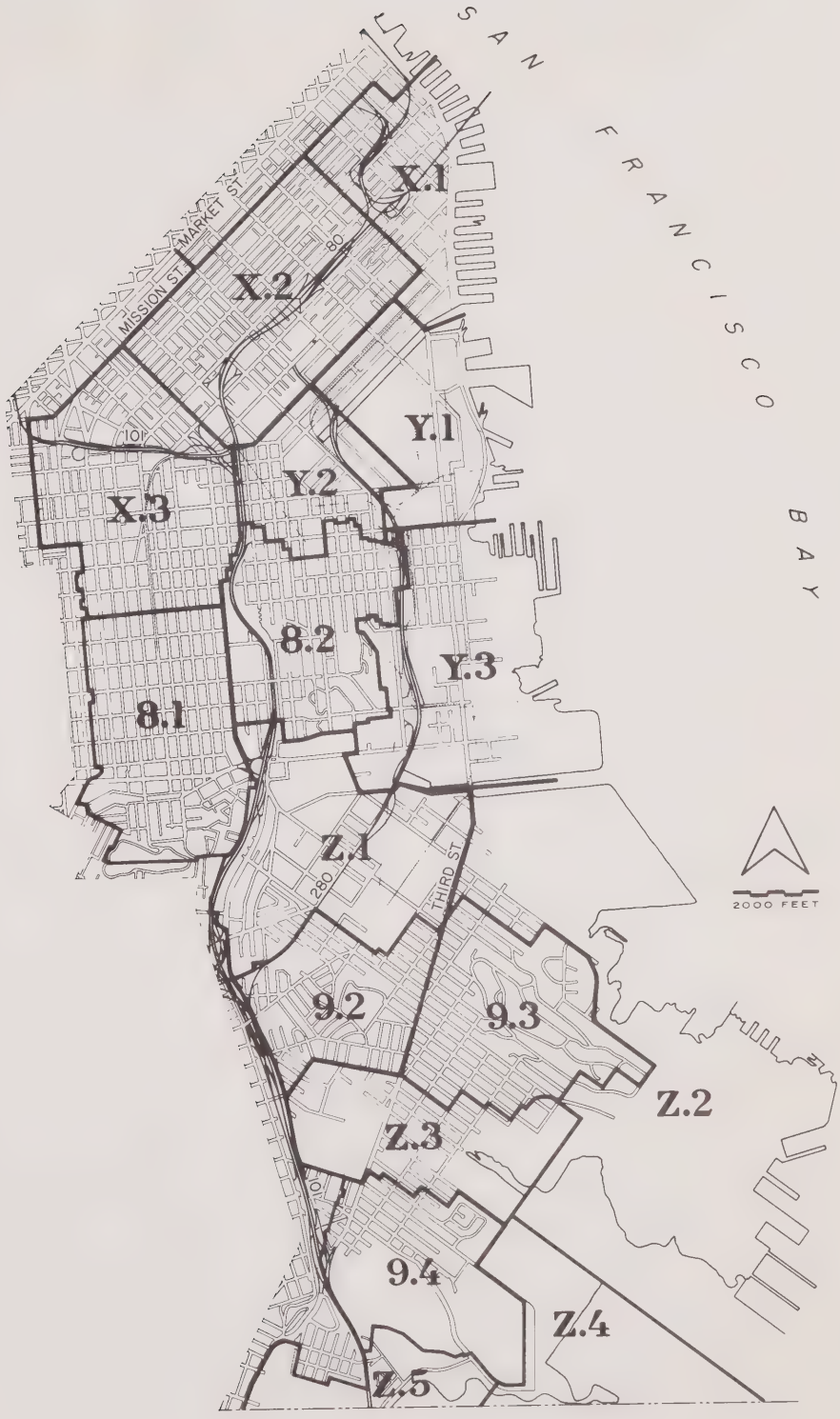
Predominant Land Uses - the types of uses in each street corridor that occur most frequently and establish the character of the area.

Amount of Building Vacancy - recorded as the percentage of buildings in each street corridor which are vacant.

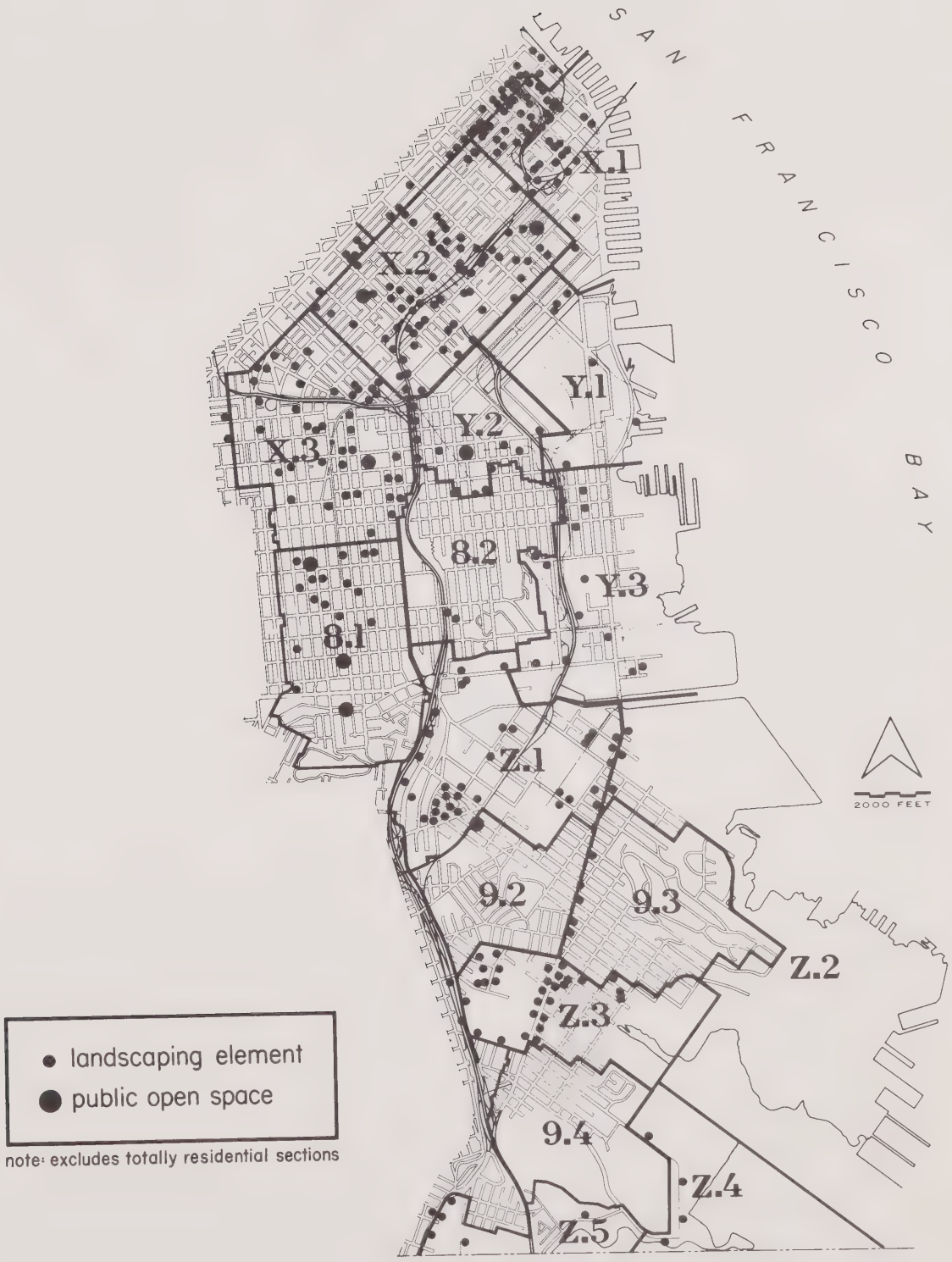
Status of Structure Maintenance - the percentages of structures in each street corridor which are either adequate, in need of surface fix-up, in need of rehabilitation or dilapidated to a point where demolition would be appropriate.

Condition of Infrastructure - general observations as to the quality of street repair, street lighting, parking facilities, transit facilities and rail and highway accessibility.

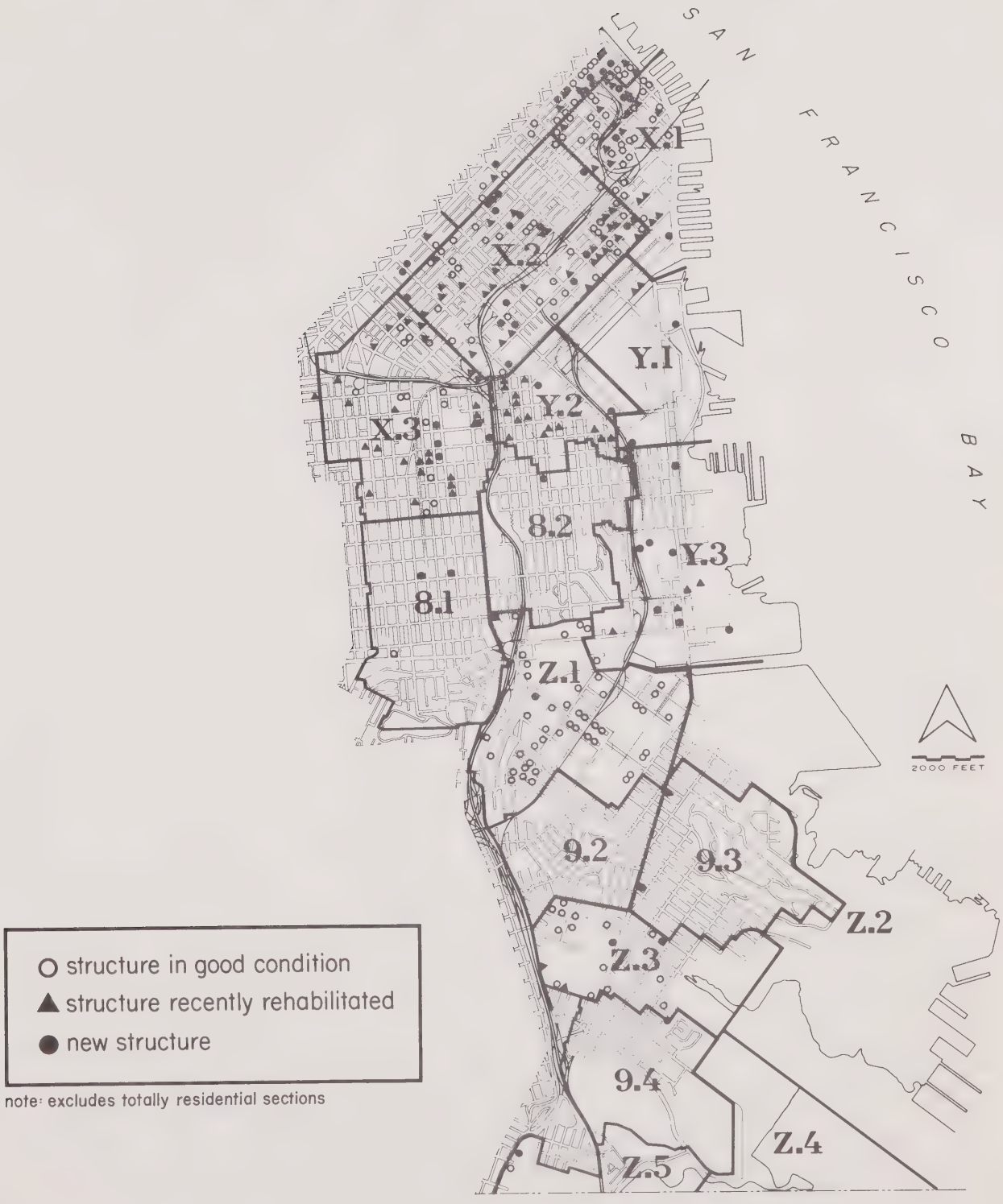
The locations of environmental amenities and detriments were recorded on a map of each of the selected planning areas. This information is shown for the entire section of the city on Maps 14 through 17 in this report. A separate information sheet was made for the uses, vacancy, maintenance and infrastructure information for each street corridor. All these materials will be available for development of the land-use policies and programs of the Commerce and Industry Element.



SELECTED COMMERCIAL AND INDUSTRIAL PLANNING AREAS

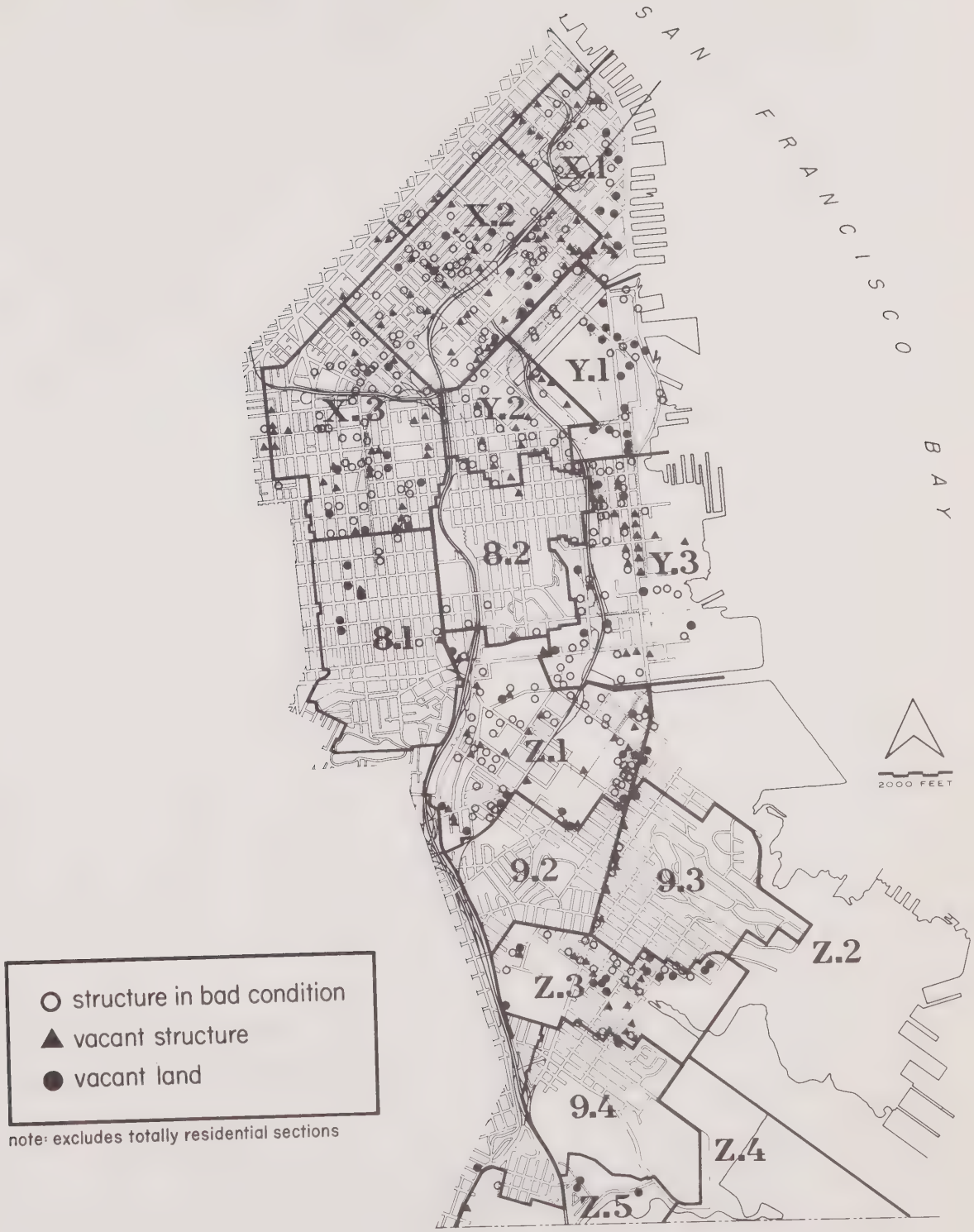


ENVIRONMENTAL AMENITIES: LANDSCAPING/OPEN SPACE

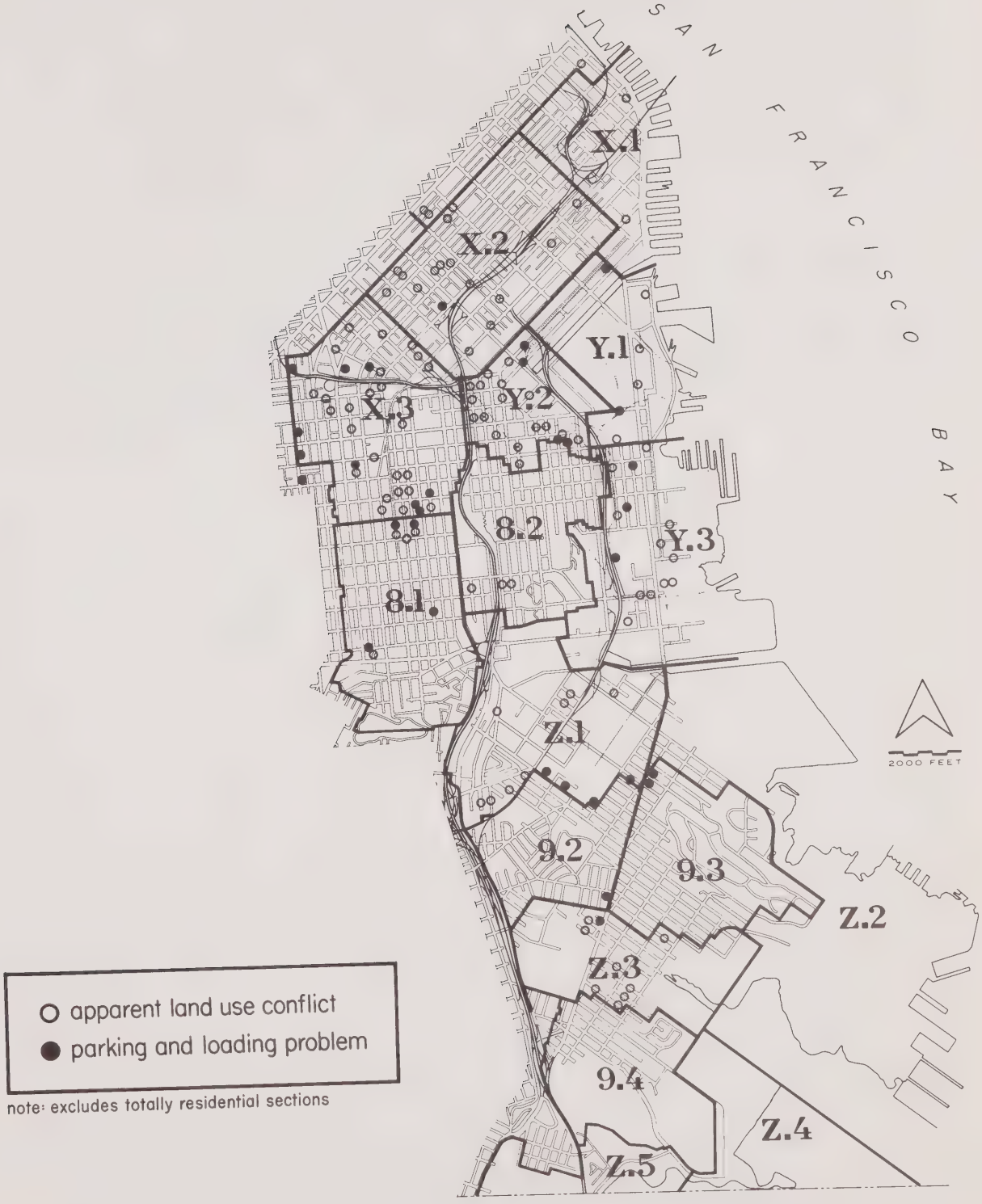


ENVIRONMENTAL AMENITIES: STRUCTURES

Field Observation Project: Selected Planning Areas Map 16



ENVIRONMENTAL DETRIMENTS: STRUCTURES AND LAND

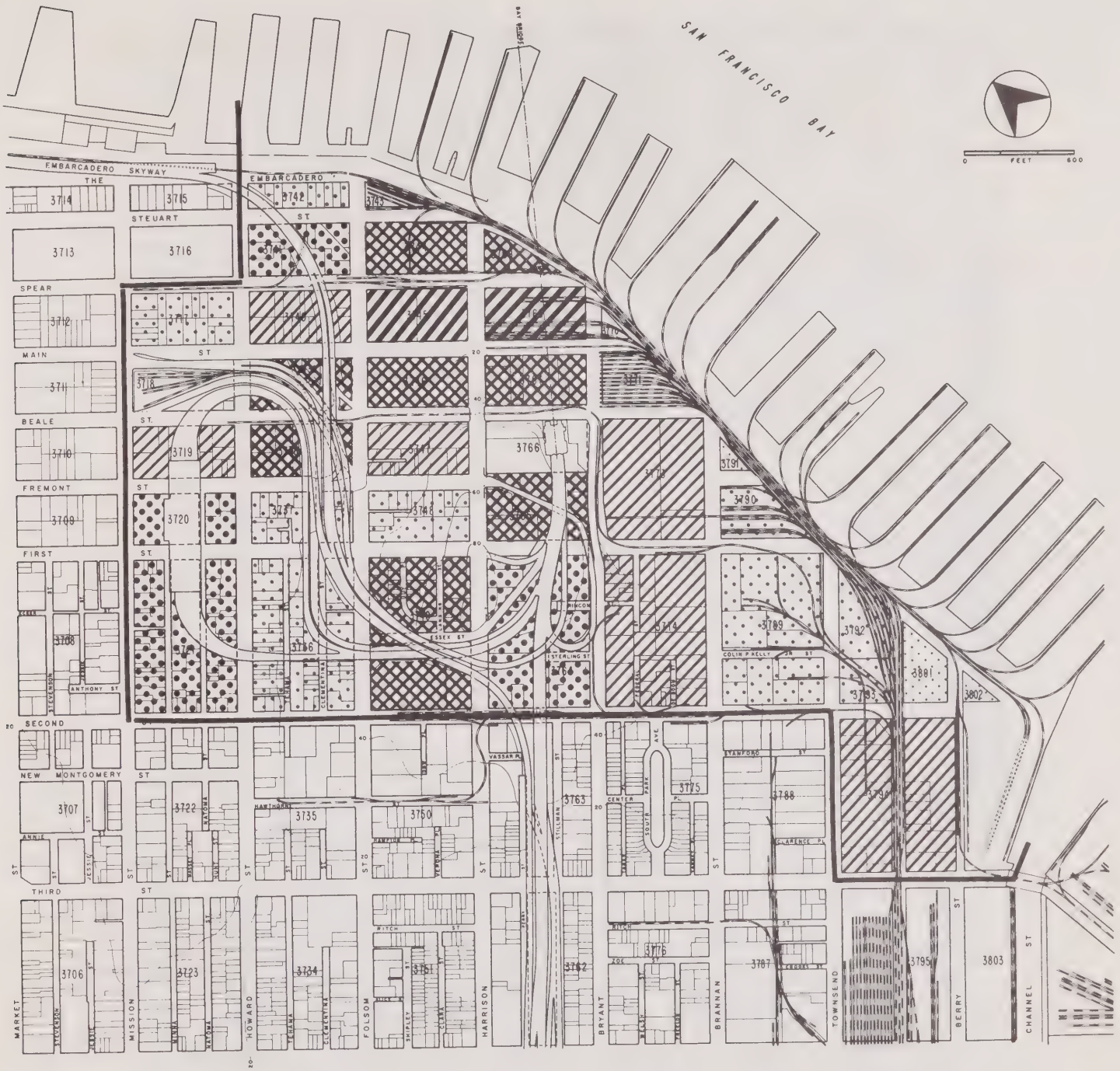


ENVIRONMENTAL DETRIMENTS: LAND USE AND PARKING

1964 BUILDING CONDITION

In 1964 a Building Condition Survey was performed by Arthur D. Little, Inc. as a part of the Community Renewal Program. In this survey an on-site inspection was made of every non-residential lot and building in the eastern one-third of San Francisco. A variety of information was collected on the condition of buildings and their environment. This information was transformed into a rating of the condition of each city block in the study area. The condition information for each of the commercial and industrial Planning Areas is shown in Maps 18 through 26.

This information is now over a decade old and many changes have occured in the intervening years. However, the 1964 survey is the most recent comprehensive survey of commercial and industrial building condition by means of on-site inspections, and it is a desirable point of reference in assessing current building condition. Detailed findings on the condition of each structure exist in the Department of City Planning's files.

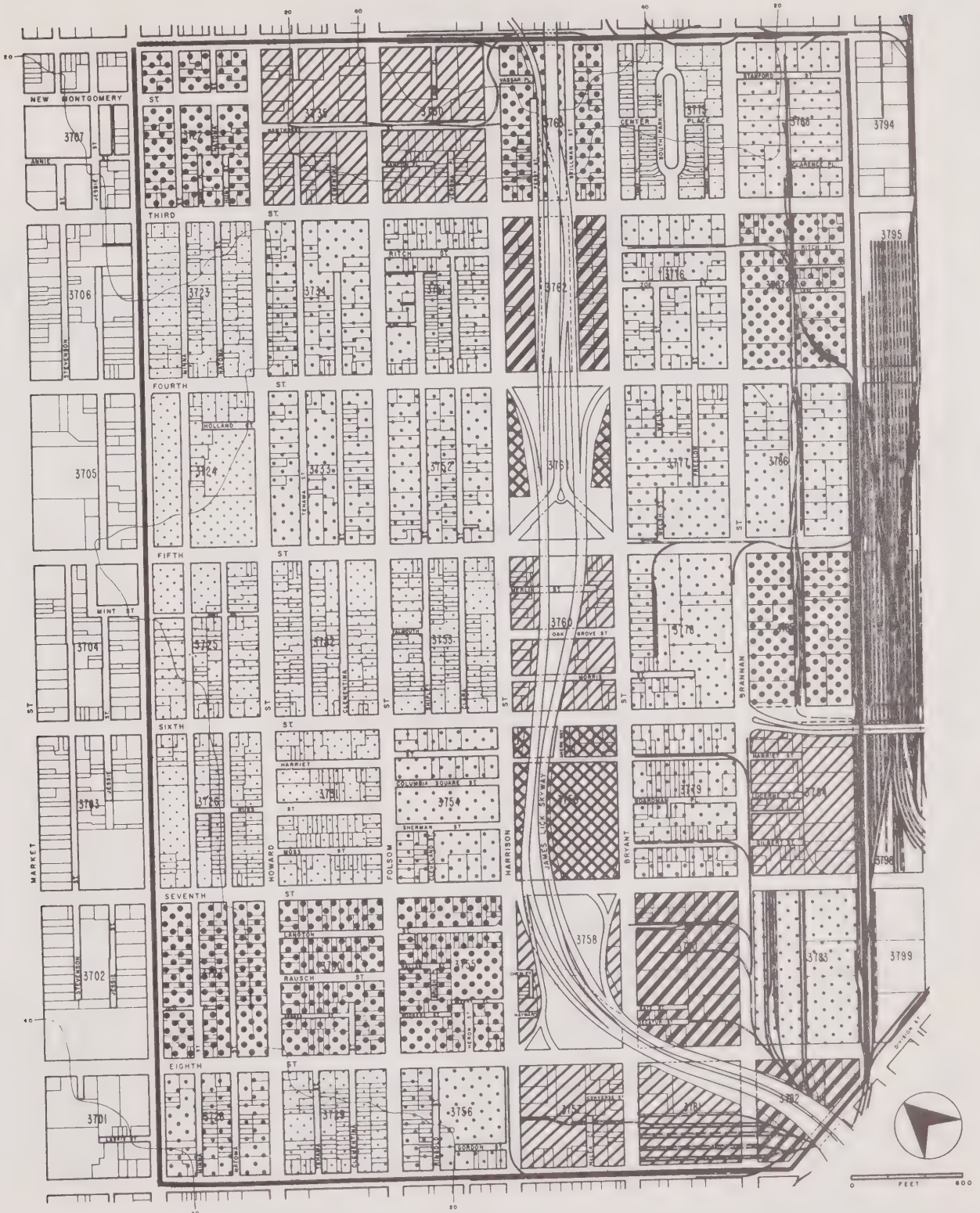


RINCON HILL

PLANNING AREA X-1

BEST — WORST

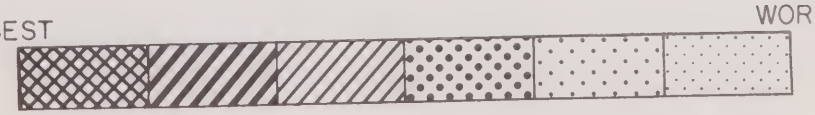
Source: Community Renewal Program, 1965



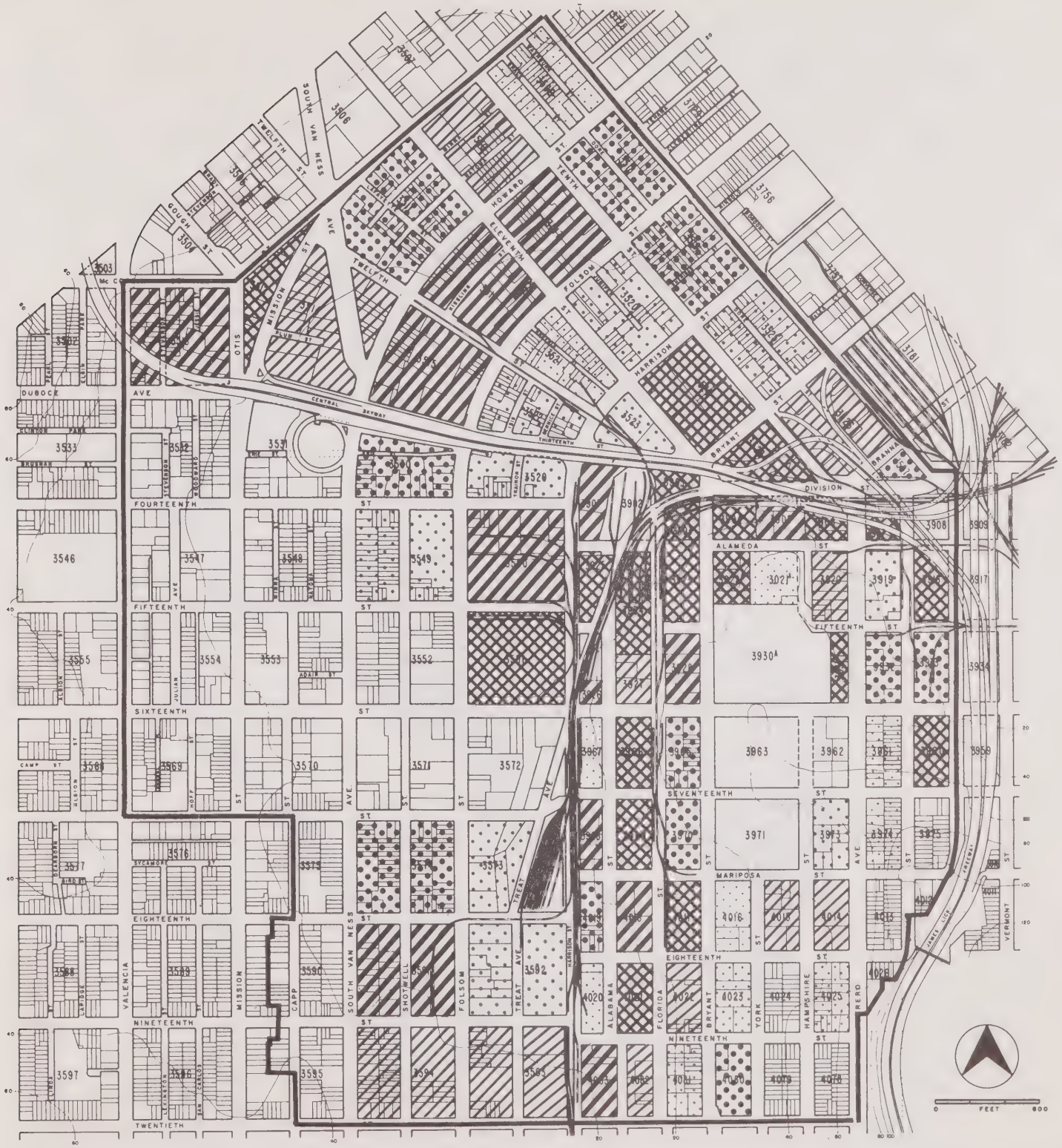
SOUTH OF MARKET

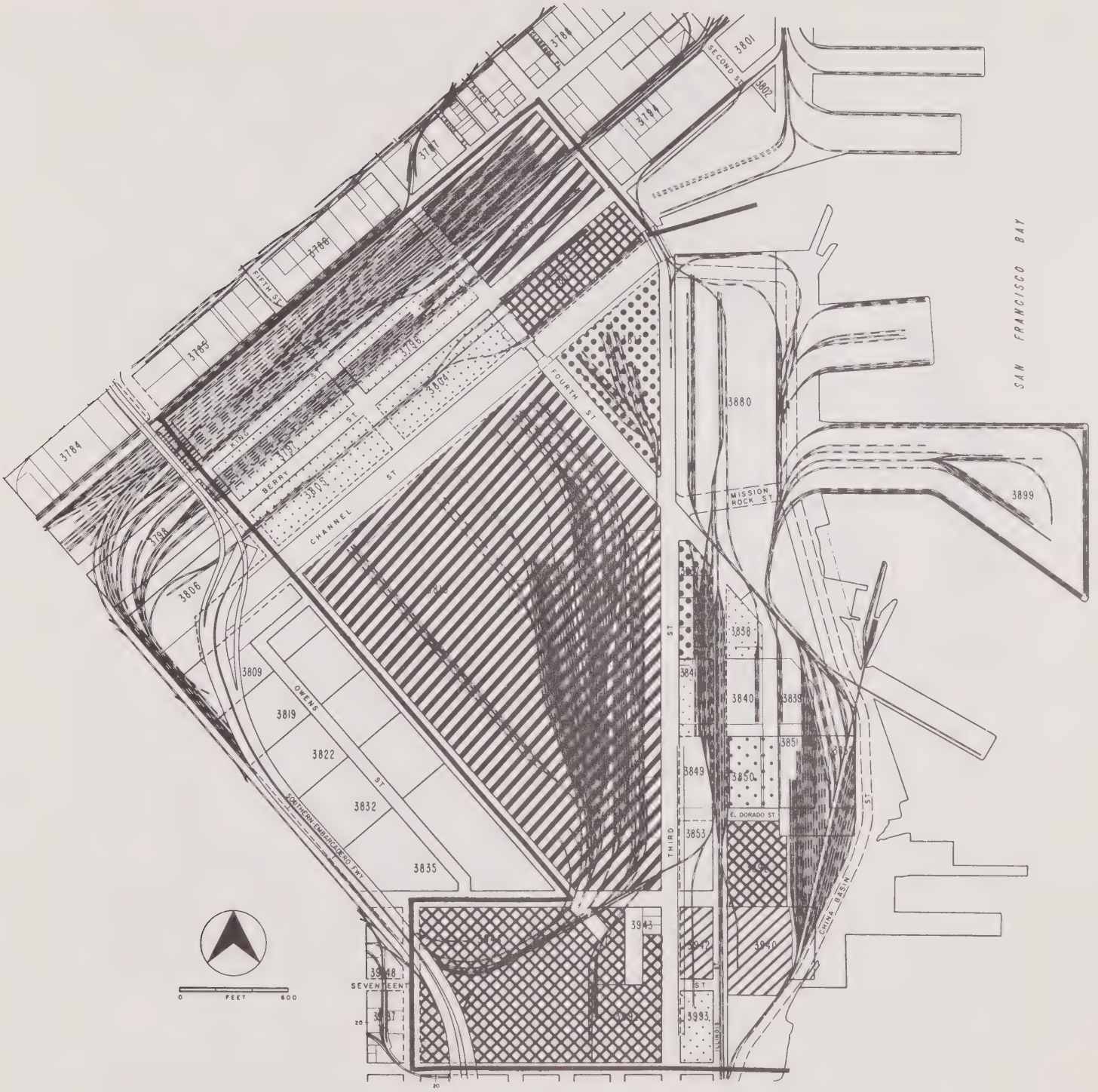
PLANNING AREA X-2

BEST WORST



Source: Community Renewal Program, 1965


DIVISION
PLANNING AREA X-3
BEST
WORST
Source: Community Renewal Program, 1965

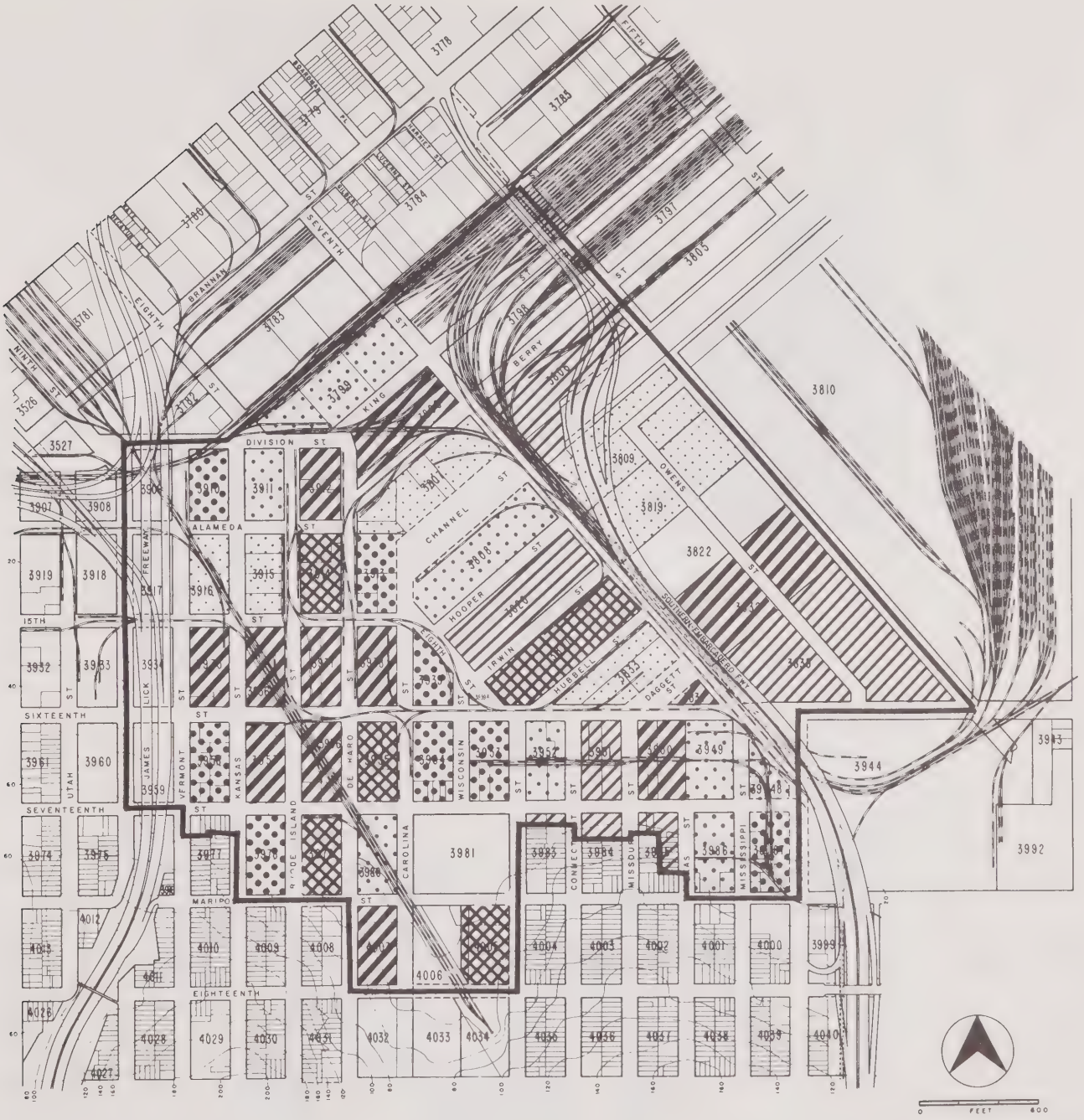


CHINA BASIN

PLANNING AREA Y-1

BEST WORST

Source: Community Renewal Program, 1965

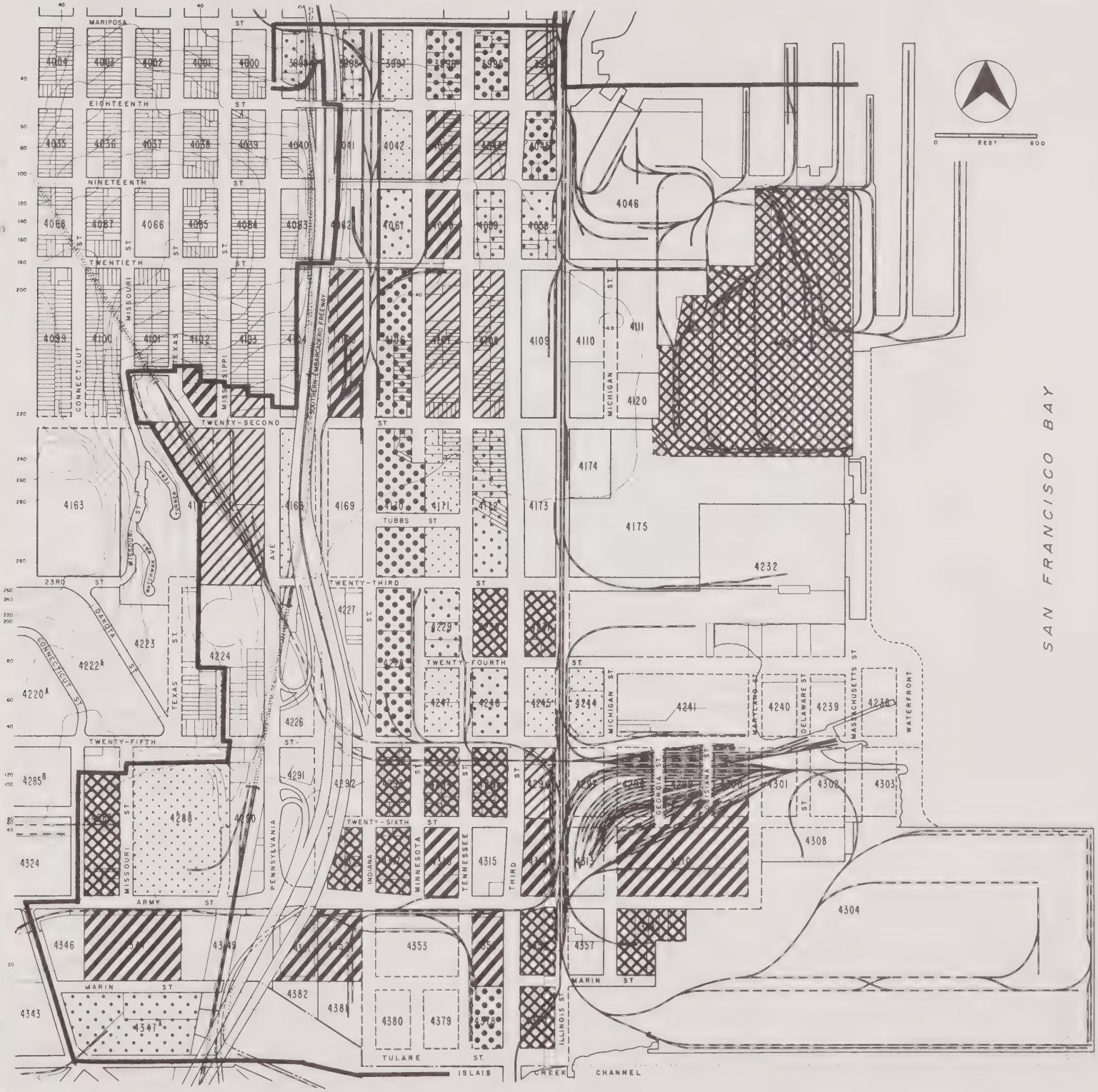


CHANNEL

PLANNING AREA Y-2

BEST WORST

Source: Community Renewal Program, 1965



CENTRAL BASIN

PLANNING AREA Y-3

BEST WORST

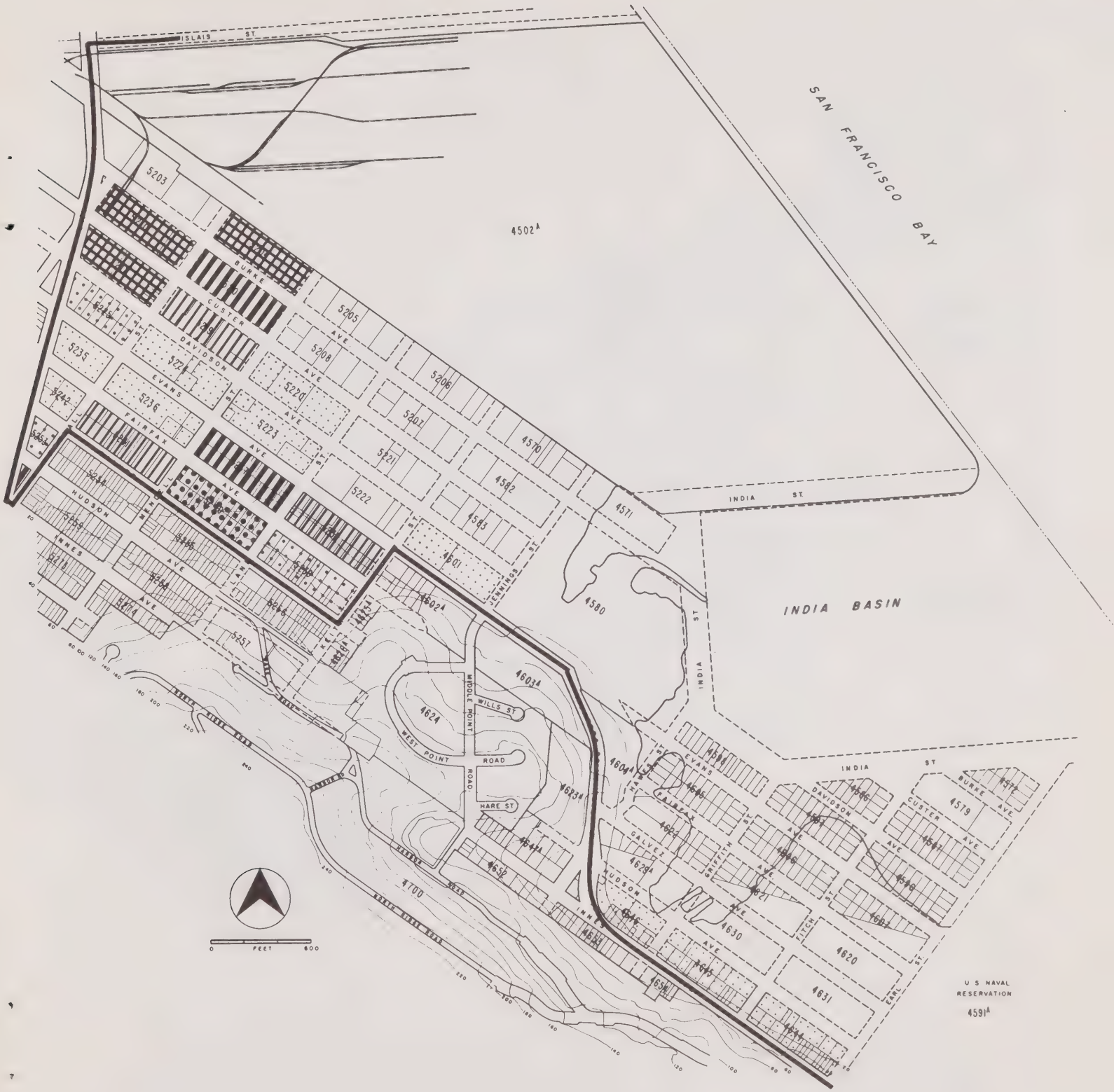
Source: Community Renewal Program, 1965

ISLAIS CREEK

PLANNING AREA Z-1

BEST — WORST

Source: Community Renewal Program, 1965

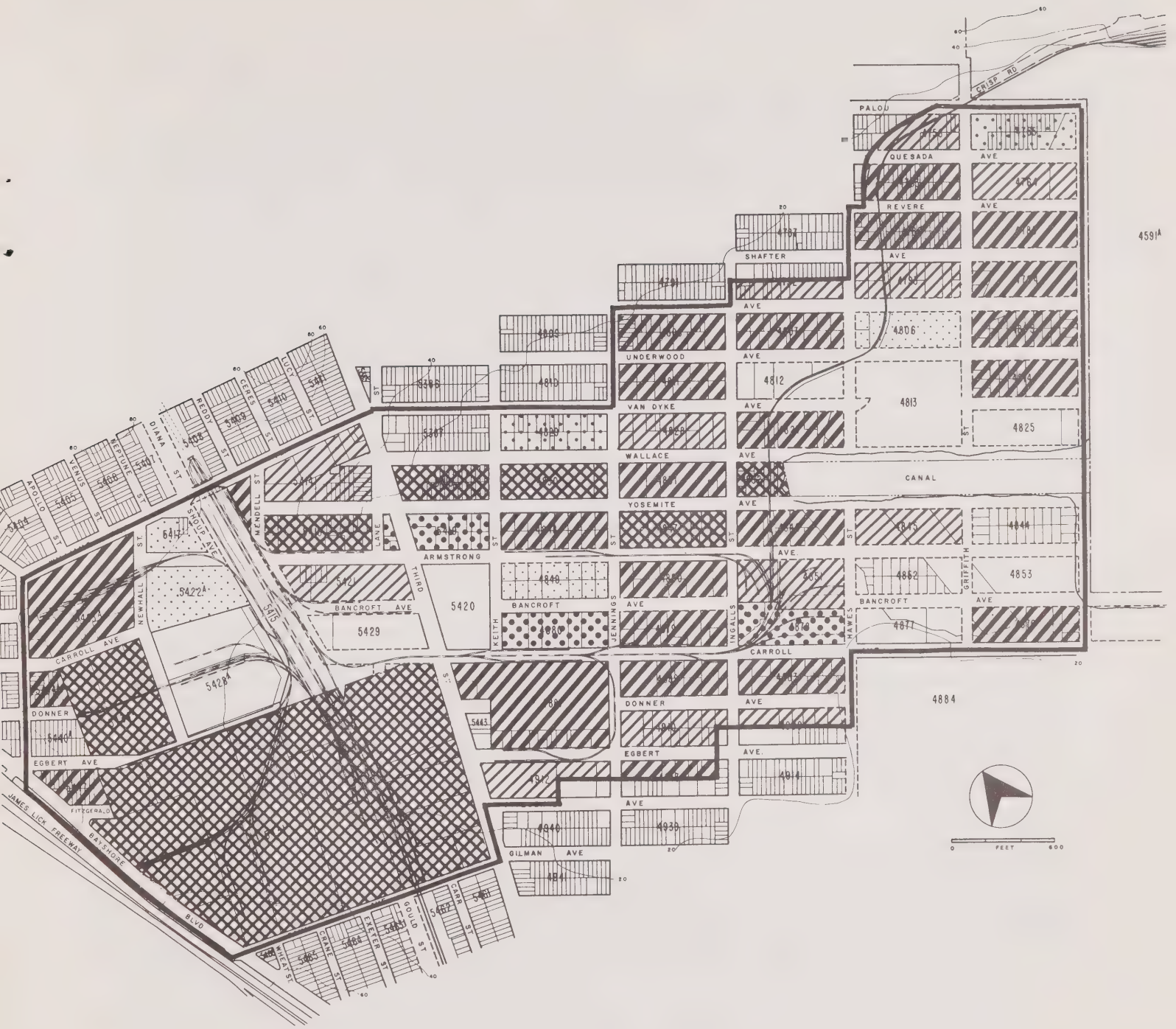


INDIA BASIN

PLANNING AREA Z-2

BEST WORST

Source: Community Renewal Program, 1965



SOUTH BASIN

PLANNING AREA Z-3

BEST WORST

Source: Community Renewal Program, 1965

CONDITION OF UTILITIES AND STREETS

Maps of utility locations supplied by the Department of Public Works indicate that almost all parts of the major commercial and industrial area of San Francisco have adequate utility service. There are sewer, water and auxiliary water facilities reaching every section of this area except for certain shoreline locations.

The Department of Public Works has performed a condition survey which rates every street and every intersection in the city. In direct observation of the roadway system, a weighted numerical value was applied to the surface condition, visual appearance, sealability of cracks, rideability, traffic volume and the amount of use by mass transit vehicles. These numerical values were then used to establish an overall rating for the condition of each street and intersection. Review of this information for the study area indicates that, while there are scattered locations of streets and intersections in bad condition, there are no large sections of land with many such ratings. Generally, the condition of the roadway system is adequate and does not aversely affect other land uses.

GEOLOGIC CONDITION

In the course of development of the Community Safety Element of the Comprehensive Plan by the Department of City Planning, a geologic evaluation was performed in 1974 by the engineering consultant URS/John A. Blume and Associates. This background information is contained in several reports available at the Department, and includes maps showing seismic hazards in San Francisco and various types of possible damage due to those hazards.

Due to the fact that a good portion of the major commercial and industrial section of San Francisco is located on unstable land which was created by filling portions of the Bay, seismic condition is particularly important there. The various potential hazards are a major consideration in the use or reuse of land in this area.

III. LAND-USE TRENDS

An important part of the background information necessary for formulation of land-use policy is a compilation of current trends in the industrial section of the city. These trends are identified in the report by the consultant to the Department of City Planning for the Commerce and Industry Element: "Commercial and Industrial Activity in San Francisco" by Arthur D. Little, Inc., June 1975.

The following are summaries of land-use trends for the industrial section of the city as they apply to each of the selected Planning Areas examined in the Field Observation Project. These summaries are based on observations by the Department of City Planning staff in addition to the Arthur D. Little report.

See Map 13 for location of Planning Areas.

X.1 Rincon Hill

There has been a substantial decrease in the amount of land used for both commerce and industry between Second Street and the Bay. This has been due mostly to replacement of older structures by new office buildings. Greater amounts of land are being devoted to parking lots as a result of parking demand and speculation on land for future office use. In the past, this area has been a location for many manufacturing uses. Manufacturing, as well as communications and transportation, continue to be major land uses in those sections not changed to office use.

If office space and parking growth occur at the highest level now projected, more manufacturing uses will be displaced than would leave the area without this pressure. The rate of office space growth in this area will be inversely related to the amount of office development that occurs in Yerba Buena Center. In addition, the demand for land for parking in this area is related both to the demand for parking to serve north and south of Market office uses, and to the amount of parking created in multi-story structures rather than in surface lots.

X.2 South of Market

The area south of Mission Street between Second and Ninth Streets contains major wholesaling, retailing, and transportation and communications activities. Land used for commerce and industry decreased substantially between 1961 and 1970, while land used for utilities and public facilities increased. A good portion of both of these trends is attributable to the acquisition of land for Yerba Buena Center. Projected office space demand and location analysis indicate that office space in Yerba Buena Center may not be built to the amount originally planned.

X.3 Division

Manufacturing of various types has been a major economic activity in this area south of Mission Street and east of the James Lick Freeway. Transportation and communications uses have been increasing recently. While there has been a decline in land used for manufacturing in this area, similar to the trend citywide, overall commercial and industrial land use has been fairly stable. Since other sections of the city could accommodate those uses which currently locate in this area, there may be substantial changes in land use from commercial and industrial to residential if there is a demand for this and the land becomes available.

Y.1 and Y.2 China Basin and Channel

This area, along the Bay between Townsend and Mariposa Streets, has been dominated by various transportation and manufacturing uses. Recent declines in the amount of land used for these sectors have been accompanied by an increase in land used for storage and business services. The waterfront in this area is in continued active maritime use.

Projections of land use for the future indicate continued low-intensity uses, including possible relocation of manufacturers from south of Market Street and other industrial uses from the Mission. New warehousing uses could occur in this area if low-cost facilities were made available. There has been a significant amount of rehabilitation of old buildings in the western portion of this area.

Y.3 Central Basin

The area between Potrero Hill and the Bay is a traditional location for heavy industry. With the decline of these uses in the city in general, this area has incurred considerable building vacancy, including the large American Can Company facility on Third Street from Twentieth to Twenty-third Street. There continues to be significant wholesaling, trucking and warehousing in the area, but the intensity of these uses has declined since 1960. Major maritime uses are located on the waterfront; the Bethlehem dry docks and ship repair are the largest of such facilities in San Francisco now that the Hunters Point Naval Shipyard is closed.

The future for the Central Basin area could include expansion of trucking facilities. Also, the vacant buildings provide the potential for reuse by industries displaced in other areas of the city. New warehousing facilities could be located in the Central Basin area, or buildings formerly used for industry could be converted to warehouse use.

Z.1 Islais Creek

The area between Third Street and I-280 south of Islais Creek is mostly devoted to manufacturing, trucking and warehousing. The Southeast Sewage Treatment Plant is a major utility use which is expanding. The leading trend in this area is abandonment of large manufacturing plants. It may be difficult to find reuses for these facilities, but there could be a need for additional warehousing. The area has been a principal location for open-air storage uses such as auto wreckers and construction contractors.

Z.2 India Basin

Manufacturing uses have declined in the area between Third Street and the Bay south of Islais Creek. However, maritime uses have increased with expanded Port facilities. A major portion of the area is used for open storage and salvage yards, and there is a considerable amount of vacant industrial land. The India Basin Redevelopment Project area is available for construction of new plants; it remains to be seen whether that area can be developed with labor-intensive land uses.

Z.3 South Basin

The industrial area on either side of Third Street north of Paul Avenue is mostly in manufacturing use. The major uses are to the west of Third, with the east containing a variety of small uses. Here again, there could be a significant demand for warehouse facilities, although this area may not be as attractive to potential users as nearby suburban areas.

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CITY PLANNING COMMISSION

Walter S. Newman, President
Mortimer Fleishhacker, Jr.
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Dean L. Macris, Director of Planning
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R. Spencer Steele, Assistant Director - Implementation
Lynn E. Pio, Administrative Secretary

AUTHORSHIP

This report was written by Charles T. Gill, Planning Coordinator, with the assistance of Robin Jones, Planner II of the San Francisco Department of City Planning.

INFORMATION RESOURCES

1964 Community Renewal Program: San Francisco Department of City Planning and Arthur D. Little, Inc., Planning Consultant

1970 Land Use Survey: San Francisco Department of City Planning

Data Analysis of 1970 Land Use Survey: Resource One, Community Computer Center

1975 Field Observation Project: San Francisco Department of City Planning

Consultant Report, "Commercial and Industrial Activity in San Francisco": Arthur D. Little, Inc., Planning Consultant

Utility Maps and Street Condition Survey: San Francisco Department of Public Works

Community Safety Element: San Francisco Department of City Planning

CONTRIBUTING STAFF

Peter S. Svirsky, Executive Assistant to the Director
Frank E. Hendricks, Senior City Planning Draftsman
Peter Groat, Planner IV, Urban Systems Analyst
Gregory Oliver, Senior Economic Analyst, Economic Analysis Unit
Ruth Durbin, Draftsman
Clarence Lee, Draftsman
Frances Lawsing, Draftsman
Jean Cody, Draftsman
Nancy Bang, Senior Clerk Stenographer